

Curriculum Vitae

MAURA R. GROSSMAN, J.D., PH.D.

- School of Computer Science, University of Waterloo ▪ Waterloo, ON N2L 3G1 Canada ▪
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EDUCATION

Georgetown University Law Center Washington, DC
Juris Doctor, *magna cum laude* 1999

- *Honors and Awards:* Order of the Coif
Dean's List (1L, 2L & 3L)
Executive Notes & Comments Editor of *The Georgetown Law Journal*
CALI Excellence for the Future Awards (Top Student) in Negotiations
Seminar & In The Legal Profession Seminar (Both 3L)
Gewirz Resident Fellow (2L & 3L)
Honors in Legal Research and Writing (1L)

New York University New York, NY
Postdoctoral Certificate in Psychotherapy & Psychoanalysis 1990

North Shore University Hospital / Cornell University Medical College Manhasset, NY
Postdoctoral Fellowship in Child and Adolescent Psychiatry 1984-1985
Doctoral Internship in Adult Psychiatry 1983-1984

Gordon F. Derner Institute of Advanced Psychological Studies / Adelphi University Garden City, NY
Doctor of Philosophy in Clinical / School Psychology 1984
Master of Arts in Psychology 1982

- *Honors and Awards:* Honorable Mention, New York State Psychological Association
Annual Paper Competition

Brown University Providence, RI
Bachelor of Arts, *magna cum laude*, with Honors in Psychology 1980

- *Honors and Awards:* Brown University Undergraduate Teaching Fellowships
National Science Foundation Undergraduate Research Fellowship

CURRENT EMPLOYMENT

David R. Cheriton School of Computer Science, University of Waterloo Waterloo, ON
Research (Full) Professor 2016–Present
Director of Women in Computer Science 2019–2020

Osgoode Hall Law School, York University Toronto, ON
Adjunct Professor of Law 2017–Present

- *Honors and Awards:* 2020 Faculty Teaching Award

Maura Grossman Law Buffalo, NY
Principal 2016–Present

GRANTS & FELLOWSHIPS

1. Recipient of *Wes Graham Faculty Research Fellowship* in the amount of \$12,500 CAD per year (2020–2023).
2. Recipient of National Sciences and Engineering Research Council of Canada (“NSERC”) PromoScience Grant in the amount of \$90,000 CAD for *Girls Mean Business* (2020–2021).
3. Recipient of *Clifford Grant for eDiscovery Law* in the amount of \$20,000 USD per year (2020–2023).
4. Recipient of David R. Cheriton School of Computer Science Faculty Operating Grant in the amount of \$30,000 CAD per year (2019–2022).
5. Recipient of Management Grant in the amount of \$35,000 CAD for *Apparatus for High-Recall Information Retrieval* (2018).
6. Recipient of National Sciences and Engineering Research Council of Canada (“NSERC”) Discovery Grant in the amount of \$20,000 CAD per year for *Evaluation of High-Recall Human-in-the-Loop Information Retrieval Technologies* (2017–2023).
7. Recipient of Ontario Research Fund Research Infrastructure (“ORF-RI”) Grant in the amount of \$67,832 for *Apparatus for High-Recall Information Retrieval* (2017-2022).
8. Recipient of Canadian Foundation for Innovation John R. Evans Leaders Fund (“CFI-JELF”) Grant in the amount of \$67,832 CAD for *Apparatus for High-Recall Information Retrieval* (2017-2022).
9. Consultant on National Science Foundation Information and Intelligent Systems (“NSF IIS”) Program Grant No. 065250, *Development and Evaluation of Search Technology for Discovery in Civil Litigation* (2011–2017).
10. Principal Investigator on National Institutes of Health (“NIH”) Center for Substance Abuse Prevention (“CSAP”) Grant in the amount of \$1,000,000 USD per year for *Project Step Ahead* (1991-1993).

SPECIAL MASTER APPOINTMENTS

1. *Genscape Inc. v. Live Power Intelligence Company NA LLC*, Civ. Ac. No. 18-cv-02525-DDD-KLM (D. Colo. 2020).
2. *ABN AMRO Capital USA LLC v. AMMERA Capital Management, LLC*, Index No. 651148/2019 (N.Y. Sup. Ct. I.A.S. Part 48 2019).
3. *United States v. Farouki*, Crim. No. 18-cr-00346-PLF (D.D.C. 2019).
4. *McNees v. Ocwen Loan Servicing, LLC*, Civ. Ac. No. 16-cv-01055-WJM-KLM (D. Colo. 2019).
5. *Vista Partners v. BrainScope Company*, Civ. Ac. No. 19-cv-00138-CMA-SKC (D. Colo. 2019).
6. *MAO-MSO Recovery II v. GEICO*, Civ. Ac. Nos. 17-cv-711-PWG and 17-cv-964-PWG (D. Md. 2019).

7. *Gilbert v. United States Olympic Committee*, Civ. Ac. No. 18-cv-00981-CMA-MEH (D. Colo. 2018).
8. *Airquip v. HomeAdvisor*, Civ. Ac. No. 1:16-cv-01849-PAB-KLM (D. Colo. 2018).
9. *Murphy v. Lowe's Home Centers, LLC*, Civ. Ac. No. 1:17-cv-01720-REB-KLM (D. Colo. 2018).
10. *United States of America v. Michael Cohen*, Crim. Ac. No. 1:18-cr-00602-WHP (S.D.N.Y. 2018) (recommended to the Court by the prosecution).
 - Submission to the Court available at https://archive.org/stream/Michael-Cohen-Court-Documents/2018-04-26-Cohen-28_djvu.txt.
 - Discussed in *Special Master Could Play a Big Role in Trump Lawyer Doc Review*, Bloomberg News (Apr. 18, 2018), available at <https://news.bloomberglaw.com/e-discovery-and-legal-tech/special-master-could-play-big-role-in-trump-lawyer-doc-review>.
11. *In re Broiler Chicken Antitrust Litigation*, No. 16 Civ. 08637 (N.D. Ill. 2017).
 - Issued *Order Regarding Search Methodology for Electronically Stored Information*, 2018 WL 1146371 (N.D. Ill. Jan 3, 2018).
12. *Rio Tinto PLC v. Vale S.A.*, No. 14 Civ. 3042 (RMB) (AJP) (S.D.N.Y. 2015).
 - Discussed by the Court in *Rio Tinto PLC v. Vale, S.A.*, 2015 WL 436720 (S.D.N.Y. July 15, 2015) (“Ms. Grossman is one of the most knowledgeable lawyers (if not *the* most knowledgeable lawyer) about TAR [...]”).
 - Issued *Stipulation and Order Re: Revised Validation and Audit Protocol for the Use of Predictive Coding in Discovery*, Case No. 14-cv-3042 (RMB) (AJP) (S.D.N.Y. Sept. 8, 2015) [Dkt. No. 338].
13. *National Day Labor Organizing Network v. U.S. Immigration and Customs Enforcement Agency*, No. 10 Civ. 3488 (S.D.N.Y. 2011).

EXPERT ENGAGEMENTS

1. *William Morris Endeavor Entertainment, LLC v. Writers Guild of America, West, Inc.*, Case No. 2:19-cv-05465-AB-AFM (C.D. Cal. 2020).
2. *In re: Ethiopian Airlines Flight ET 302 Crash*, Lead Case No. 1:19-cv-02170 (Consolidated) (N.D. Ill. 2020).
3. *Kalra v. Mercedes Benz Canada Inc.*, File No. CV-16-550271-00CP (ON Sup. Ct. Justice 2019).
4. *Quinn Insurance Ltd.(Under Administration) v. Price Waterhouse Cooper (A Firm)*, Case No. 2012/1540 P (High Court (Commercial) of Ireland).
5. *In re Domestic Airline Travel Antitrust Litigation*, MDL No. 2656, Misc. No. 15-1404 (CKK) (D.D.C. 2018).
 - Cited by the Court in *In re Domestic Airline Travel Antitrust Litigation*, 2018 WL 4441507 (D.D.C. Sept. 13, 2018).
6. *In re: Intel Corp. CPU Marketing, Sales Practices and Products Liability Litigation*, Case No. 3:18-md-02828-SI (D. Or. 2018), *In re: Intel Corp. Securities Litigation*, Case No. 18-cv-00507-YGR (N.D. Cal.

2018), *Lipovich v. Krzanich*, Case No. 5:18-cv-01489 (N.D. Cal. 2018), and *In re: Intel Corp. Shareholder Derivative Litigation*, Case No. 5:17-md-02773-LHK-NMC (N.D. Cal. 2018).

7. *In re Qualcomm Litigation*, Case No. 3:17-cv-00108-GPC-MDD (S.D. Cal. 2017); *Federal Trade Commission v. Qualcomm Inc.*, Case No. 5:17-cv-00220-LHK-NMC (N.D. Cal. 2017); *In re Qualcomm Antitrust Litigation*, Case No. 5:17-md-02773-LHK-NMC (N.D. Cal. 2017).
8. *In re: Xarelto (Rivaroxaban) Products Liability Litigation*, MDL No. 14-md-2592 (EEF) (E.D. La. 2017).
9. *Federal Trade Commission v. Church & Dwight Co., Inc.*, Case No. 1:10-00149-EGS-JMF D.D.C. 2010) (appointed by Hon. John M. Facciola as advisor to the Court).

SELECTED PROFESSIONAL RECOGNITION

Ranked in *Chambers & Partners USA and Global Litigation: E-Discovery* (2013–2020)

- “Maura Grossman is noted for her expertise in predictive coding and technology-assisted review, with peers reporting: “She knows more about TAR than anybody in the world. Her depth of knowledge sees her regularly appointed as a special master... Her legal and technical skills and services are superlative.” (2020).
- “Maura Grossman is widely acknowledged to be one of the most distinguished specialists in predictive coding and is lauded as ‘the queen of TAR.’ She is routinely appointed as a special master. ‘She changed the paradigm and has created tools and thinking. She is brilliant.’” (2019).
- “Maura Grossman is a recognized leader in TAR work. . . ‘She’s been a trailblazer and thought leader in the use of artificial intelligence in e-discovery.’ She is also frequently called upon to act as a special master, mediator, and court-appointed expert, where she attracts praise for her ‘encyclopedic knowledge of e-discovery law.’” (2018).

Named by *Who’s Who Litigation: eDiscovery Practitioners – Canada* as “among the World’s highest-ranking eDiscovery lawyers” (2020), as “one of the leading experts, if not the leading expert, in technology-assisted review” (2019), and as a “Leading Individual” and “Most Highly Regarded” (2018) (“Commentators say ‘she is ‘a star’ in the market and hold her in high esteem as ‘a highly effective legal expert on technology and machine learning algorithms.’”).

Named by *Who’s Who Legal: Thought Leaders – Litigation*, as one of five (2020) or six (2019) top Canadian and Global eDiscovery Lawyers (“an elite eDiscovery specialist,” who is “one of the leading experts, if not the leading expert in technology-assisted review”).

Selected by the CENTRE@CLEF2019: Maura R. Grossman and Gordon V. Cormack, *MRG_UWaterloo and Waterloo Cormack Participation in the TREC 2017 Common Core Track*, published in the Proc. of the Text Retrieval Conference (“TREC”) 2017, selected for “a joint CLEF/NCTIR/TREC Task challenging participants to reproduce the best results of the most interesting systems in previous additions of CLEF/NCTIR/TREC” (2019).

Named by *The Obelisk* as “One of the Top Six Women in Law Who are Changing the Legal Industry as We Know It” (2018).

Named by the ABA Legal Technology Resource Center to its list of Ten Top “Women in Legal Tech” (2017).

Named by Fastcase to the *Fastcase50 List* (2017), honoring the year's 50 "smartest, most courageous innovators, techies, visionaries, and leaders in the law."

Named by the Association of Certified E-Discovery Specialists ("ACEDS") and Women in eDiscovery ("WiE") as a "Pioneer and Innovator in eDiscovery and Legal Technology" (2017).

Named by the *American Bar Association ("ABA") Journal* as a "Legal Rebel" (Sept. 2016 issue), honoring "the 10 most notable innovators and mavericks in the legal profession."

Profiled in a feature story in *The American Lawyer* (Feb. 2016 issue), "The Lawyer Inventor: Maura Grossman of Wachtell Developed a Better Way to Do E-Discovery. Why are So Few Other Firms Taking a Lead with Tech?" by Susan Beck.

Ranked in *Who's Who Legal: E-Discovery Analysis* as "'sensational' according to her peers and 'a go-to' in the area" of eDiscovery (2015 & 2016) .

BAR MEMBERSHIPS

New York State	2000–Present
Southern District of New York	2002–Present
Eastern District of New York	2002–Present

OTHER LEGAL EXPERIENCE

<u>Wachtell, Lipton, Rosen & Katz</u>	New York, NY
Of Counsel	2013–2016
Counsel	2007–2013
Litigation Associate	1999–2003 & 2004–2006

<u>Altria Corporate Services, Inc.</u>	New York, NY
Assistant General Counsel	2003

<u>Kirkland & Ellis</u>	New York, NY
Summer Associate	1998

<u>Powell, Goldstein, Frazer & Murphy, LLP</u>	Washington, DC
Summer Associate	1997

PSYCHOLOGY EXPERIENCE

<u>Fordham-Tremont Community Mental Health Center / St. Barnabus Hospital</u>	Bronx, NY
Deputy Director for Clinical & Preventive Services	1991–1996

- *Honors and Awards* Certificate of Recognition for Innovative Mental Health Planning in New York State, Mental Health Planning Advisory Council
Creative Connections Award for Systems Initiatives, New York City Department of Mental Health, Mental Retardation and

Alcoholism Services
Certificate of Recognition for Excellence in Bringing Mental Illness
Awareness to the Public, American Psychiatric Association
Certificate of Recognition for Outstanding Contribution to Mental
Illness Awareness Week, Bronx Borough President's Office

Private Practice

Psychologist & Consultant Forest Hills, NY
1988–1996

Woodhull Medical & Mental Health Center / NYC Health & Hospitals Corporation

Director of Psychological Services Brooklyn, NY
1988–1996

Pride of Judea Mental Health Center

Psychologist & Director of Training Queens, NY
1986–1988

Fordham University Counseling and Psychological Services

Psychologist & Assistant Director Bronx, NY
1985–1986

ADJUNCT FACULTY POSITIONS

Vector Institute	2018–Present	Toronto, ON
Georgetown University Law Center	2014–2018	Washington, DC
Columbia Law School	2012–2016	New York, NY
Pace University Law School	2011–2013	White Plains, NY
Rutgers Law School–Newark	2010–2012	Newark, NJ
New York College of Osteopathic Medicine	1992–1996	Valhalla, NY
Columbia University School of Social Work	1992–1996	New York, NY
New York University	1989–1991	New York, NY
Queens College of the City University of New York	1988–1989	Flushing, NY
Gordon F. Derner Institute / Adelphi University	1981–1988	Garden City, NY

COURSES TAUGHT

Ethics for Data Scientists	2020–Present
Artificial Intelligence: Law, Ethics & Policy	2017–Present
Electronic Discovery	2010–2018
High-Stakes Information Retrieval	2016
Psychological Assessment	1981–1989

PATENTS

1. Maura R. Grossman and Gordon V. Cormack, *Systems and Methods for a Scalable Continuous Active Learning Approach to Information Classification*, US20160371262 (Allowed 2020).
2. Maura R. Grossman and Gordon V. Cormack, *Systems and Methods for Conducting and Terminating Technology Assisted Review*, US10445374 (Granted/Issued 2019).

3. Maura R. Grossman and Gordon V. Cormack, *Systems and Methods for Conducting and Terminating Technology Assisted Review*, US10353961 (Granted/Issued 2019).
4. Maura R. Grossman and Gordon V. Cormack, *Systems and Methods for Conducting and Terminating Technology Assisted Review*, US10242001 (Granted/Issued 2019).
5. Maura R. Grossman and Gordon V. Cormack, *Systems and Methods for Conducting a Highly Autonomous Technology Assisted Review Classification*, US10229117 (Granted/Issued 2019).
6. Maura R. Grossman and Gordon V. Cormack, *Systems and Methods for Classifying Electronic Information Using Advanced Active Learning Techniques*, US20170270115 (Pending 2017).
7. Maura R. Grossman and G.V. Cormack, *Systems and Methods for Classifying Electronic Information Using Advanced Active Learning Techniques*, US9122681 (Granted/Issued 2014).
8. Maura R. Grossman and Gordon V. Cormack, *Systems and Methods for Classifying Electronic Information Using Advanced Active Learning Techniques*, US8838606 (Granted/Issued 2014).
9. Maura R. Grossman and Gordon V. Cormack, *Systems and Methods for Classifying Electronic Information Using Advanced Active Learning Techniques*, US8713023 (Granted/Issued 2014).
10. Maura R. Grossman and Gordon V. Cormack, *Systems and Methods for Classifying Electronic Information Using Advanced Active Learning Techniques*, US9678957 (Granted/Issued 2014).

SOFTWARE DISTRIBUTION

1. Mustafa Abualsaud, Nimesh Ghelani, Haotian Zhang, Mark D. Smucker, Gordon V. Cormack, and Maura R. Grossman, *HiCAL: A System for Efficient High-Recall Retrieval*, available at <https://github.com/hical/HiCAL>.

TRADEMARKS

1. *Continuous Active Learning* (Registered Oct. 2019)
2. *CAL* (Registered Oct. 2019)

SELECTED PROFESSIONAL AFFILIATIONS AND SERVICE 2007 – PRESENT

<i>Member</i> , Editorial Review Board, Institute of Electrical and Electronics Engineers (“IEEE”) Global Initiative Law Committee, New York University (“NYU”) Center on Civil Justice, and National Judicial College (“NJC”) Working Group on ESI (“Electronically Stored Information”) Review Protocol	2020–Present
<i>Member</i> , Technology Working Group of Chief Judge Janet DiFiore’s Commission to Reimagine the Future of New York’s Courts	2020–Present
<i>Member</i> , Digital Evidence and eDiscovery Working Group (“DDEE”) of the Ontario Bar Association (“OBA”)	2020–Present

<i>Member</i> , Institute of Electrical and Electronics Engineers (“IEEE”) Standards Association Working Group on IEEE P2863 – Recommended Practice for Organizational Governance of Artificial Intelligence	2020–Present
<i>Planning Committee Member</i> , Ontario Bar Association (“OBA”) and Sedona Canada 2020 Digital Evidence and eDiscovery Institute	2020–Present
<i>Member</i> , Electronic Discovery Reference Model (“EDRM”) Global Advisory Council	2020–Present
<i>Member</i> , Global Advisory Board, Association of Certified eDiscovery Specialists (“ACEDS”)	2019–Present
<i>Member and Drafting Team Member</i> , The Sedona Conference Working Group 7 – Sedona Canada and The Sedona Canada Principles Addressing Electronic Discovery: Third Edition	2019–Present
<i>Program Committee Member</i> , The Masters Conference Toronto 2020	2019–Present
<i>Member</i> , Merlin Legal Open Source Foundation Advisory Board	2019–Present
<i>Member</i> , The Sedona Conference Working Group Series Leadership Council	2019–Present
<i>Member</i> , University of Waterloo Artificial Intelligence Institute	2017–Present
<i>Member</i> , University of Waterloo Cybersecurity and Privacy Institute	2017–Present
<i>Chair</i> , AI Subcommittee and <i>Member</i> , New York State Bar Association Committee on Technology and the Legal Profession	2017–Present
<i>Approved E-Discovery Mediator and E-Discovery Special Master</i> , United States District Court for the Western District of Pennsylvania	2016–Present
<i>Co-Chair and Member</i> , eDiscovery Committee, New York State Bar Association Commercial and Federal Litigation Section	2015–Present
<i>Member</i> , Advisory Board and Planning Committee, Arizona State University (“ASU”) – Arkfeld Annual eDiscovery and Digital Evidence Conference	2015–Present
<i>Research Collaborator, Volunteer, and Contractor</i> , The Library of Virginia	2015–Present
<ul style="list-style-type: none"> ▪ Reported in Susan Beck, Wachtell E-Discovery Guru Sets Sights on Presidential Race, <i>The American Lawyer</i> (July 27, 2016), available at https://www.law.com/sites/almstaff/2016/07/27/wachtell-e-discovery-guru-sets-sights-on-presidential-race/. ▪ Reported in Gabe Friedman, <i>See and Search Tim Kaine’s Email on This Website</i>, <i>Bloomberg Law: Business & Practice</i> (July 27, 2016), available at https://news.bloomberglaw.com/business-and-practice/see-and-search-tim-kaines-emails-on-this-website. ▪ Reported in Victor Li, E-Discovery Pioneer Creates Smart Search for Archive of VP Candidate’s Emails, <i>American Bar Association (“ABA”) Journal</i> (July 28, 2016), available at https://www.abajournal.com/news/ 	

- [article/e_discovery_pioneer_launches_second_act.](#)
- Reported in Roger Christman, *Library Makes New Batch of Emails From Governor Timothy M. Kaine Administration Available Online*, The Uncommon Wealth: Voices From the Library of Virginia (Oct. 18, 2018), available at <https://uncommonwealth.virginiamemory.com/blog/2018/10/18/library-makes-new-batch-of-emails-from-governor-timothy-m-kaine-administration-available-online-3/>.
- Reported in Susangray Eaken Page, *The Elephant in the Room: Artificial Intelligence Tapped to Help Process a Mountain of Governor Tim Kaine's Emails*, 4 BroadSIDE: The Magazine of the Library of Virginia 10-11 (Dec. 2018).

<i>Steering Committee Member and Member</i> , Seventh Circuit Council on eDiscovery and Digital Information	2012–Present
<i>Planning Committee Co-Chair and Member</i> , and <i>Advisory Board Member</i> , The Georgetown Advanced eDiscovery Institute	2010–Present
<i>Steering Committee Member and Member</i> , The Sedona Conference Working Group 1 on Best Practices for Electronic Retention and Production	2007–Present
<i>Member</i> , University of Waterloo School of Computer Science Executive Committee	2019–2020
<i>Member</i> , University of Waterloo Committee on Women in Mathematics (“WiM”)	2019–2020
<i>Program Committee Member</i> , 17th Association for Computing Machinery (“ACM”) International Conference on AI and the Law (“ICAIL 2019”)	2018
<i>Technical Program Committee Member</i> , 2018 International Workshop on Legal Data Analytics and Mining (“LegDAM 2018”) at the 27th ACM International Conference on Information and Knowledge Management (“CIKM 2018”)	2018
<i>Organizer and Program Co-Chair</i> , 12th Annual Sedona Conference Institute (“TSCI”) Program on Applying eDiscovery Skills and Technology to All Areas of the Law	2018
<i>External Reviewer</i> , Canadian Institute for Advanced Research (“CIFAR”) UK Research and Innovation (“UKRI”) and Centre National de la Recherche Scientifique (“CRNS”) Global Competition for AI & Society Research Workshops on Trust in AI Systems	2018
<i>Member of Judging Panel</i> , Hausfeld LLP / Sedona Conference 2018 William P. Butterfield Award for Excellence in eDiscovery Writing	2018
<i>Member</i> , Law Committee, The Institute of Electrical and Electronics Engineers (“IEEE”) Global Initiative on Ethics of Autonomous and Intelligent Systems	2018
<i>Member</i> , Balsillie School of International Affairs AI and Human Rights Advisory Board	2017–2018
<i>Participating Team</i> , National Institute of Standards and Technology’s (“NIST’s”) Text REtrieval Conference (“TREC”) 2017 and 2018 Common Core Tracks	2017–2018

<i>Participating Team</i> , 2017 and 2018 CLEF eHealth Labs: Technology Assisted Reviews in Empirical Medicine	2017–2018
<i>Member</i> , The Benjamin N. Cardozo School of Law Data Law Initiative Advisory Board	2014–2018
<i>Member</i> , Bloomberg Bureau of National Affairs (“BNA”) Digital Discovery & eEvidence Report Advisory Board	2010–2018
<i>Program Committee Member</i> , Association for the Advancement of AI / Association for Computing Machinery (“AAAI/ACM”) 2018 Conference on AI, Ethics & Society	2017
<i>Co-Chair</i> , eDiscovery Working Group for the New York State Unified Court System	2010–2016
<i>Founding Co-Coordinator and Participating Team</i> , National Institute of Standards and Technology’s (“NIST’s”) Text REtrieval Conference (“TREC”) 2015 and 2016 Total Recall Tracks	2015–2016
<i>Organizer and Program Chair</i> , The Sedona Conference Institute New York	2013
<i>Member</i> , Attorney Advisory Group to the Judicial Improvements Committee of the U.S. District Court for the Southern District of New York	2011
<i>Co-Coordinator, Topic Authority, and Participating Team</i> , National Institute of Standards and Technology’s (“NIST’s”) Text Retrieval Conference (“TREC”) 2008–2011 Legal Tracks	2008–2011
<i>Member</i> , The Association of the Bar of the City of New York Committee on Professional and Judicial Ethics	2007–2008

RESEARCH INTERESTS

My principal research focus is on high-stakes information retrieval, which falls at the intersection of technology and other disciplines including the law, government archives, and most recently, health care. I study the application and evaluation of supervised machine-learning technologies for use in electronic discovery in litigation, in the curation of government records, and for systematic reviews in evidence-based medicine. I also conduct research in the area of the ethical, legal, and policy implications of artificial intelligence.

REFEREED JOURNAL ARTICLES, LAW REVIEWS & PEER-REVIEWED CONFERENCE PAPERS

1. Patricia Rios, Amruta Radhakrishnan, Chantal Williams, Naveeta Ramkissoon, Ba’ Pham, Gordon V. Cormack, Maura R. Grossman, Sharon E. Strauss, Matthew P. Muller, and Andrea C. Tricco, *Effectiveness and Safety of Therapeutic Options for COVID-19 and Other Coronaviruses That Cause Serious Respiratory Infections*, J. Systematic Reviews [In Preparation].
 - Research featured in Robert Ambrogi, *How E-Discovery Software Is Helping Battle COVID-19*, Above the Law (June 29, 2020).
 - Research featured in Robert Williams, *Staying on Top of COVID-19 Discoveries*, The Waterloo Region Record (May 24, 2020).

- Research featured in Samantha Green, *Can Technology-Assisted Review Expedite Finding the Cure for COVID-19?*, JD Supra (May 21, 2020) and Epiq Angle (May 20, 2020).
 - Research featured in *Using Technology-Assisted Review to Find Effective Treatment, Procedures to Mitigate COVID-19*, Association for Computing Machinery (“ACM”) TechNews (May 11, 2020).
 - Research featured in Doug Austin, *Maura Grossman and Gordon Cormack Put TAR to Work to Help with the COVID-19 Fight: eDiscovery Trends*, eDiscovery Today (May 7, 2020).
 - Research featured in Rob Robinson, *A World of Difference: Technology-Assisted Review in the Fight Against COVID-19*, Complex Discovery (May 7, 2020).
2. Maura R. Grossman (ed.), *The Sedona Canada Principles Addressing Electronic Discovery: Third Ed.*, The Sedona Conference [Submitted and Under Review].
 3. Patricia Rios, Amruta Radhakrishnan, Chantal Williams, Naveeta Ramkissoon, Ba’ Pham, Gordon V. Cormack, Maura R. Grossman, Matthew P. Muller, Sharon E. Straus, and Andrea C. Tricco, *Preventing the Transmission of Coronavirus (COVID-19) in Older Adults Aged 60 Years and Above Living in Long-Term Care*, J. Systematic Reviews [Submitted and Under Review].
 - Research featured in Robert Ambrogi, *How E-Discovery Software Is Helping Battle COVID-19*, Above the Law (June 29, 2020).
 - Research featured in Robert Williams, *Staying on Top of COVID-19 Discoveries*, The Waterloo Region Record (May 24, 2020).
 - Research featured in Samantha Green, *Can Technology-Assisted Review Expedite Finding the Cure for COVID-19?*, JD Supra (May 21, 2020) and Epiq Angle (May 20, 2020).
 - Research featured in *Using Technology-Assisted Review to Find Effective Treatment, Procedures to Mitigate COVID-19*, Association for Computing Machinery (“ACM”) TechNews (May 11, 2020).
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 - Research featured in Rob Robinson, *A World of Difference: Technology-Assisted Review in the Fight Against COVID-19*, Complex Discovery (May 7, 2020).
 4. Haotian Zhang, Gordon V. Cormack, Maura R. Grossman, and Mark D. Smucker, *Evaluating Sentence-Level Relevance Feedback for High-Recall Retrieval*, 22 Info. Retrieval J. (“IRJ”) 1-26 (2020).
 5. Gordon V. Cormack and Maura R. Grossman, *Unbiased Low-Variance Measures for Precision and Related Information Retrieval Effectiveness Measures*, Proc. of the 42nd Int’l ACM SIGIR Conference on Rsch. & Dev. in Info. Retrieval (“SIGIR 2019”) 945-48 (2019).
 6. Gordon V. Cormack and Maura R. Grossman, *Quantifying Bias and Variance Measures of System Rankings*, Proc. of the 42nd Int’l ACM SIGIR Conference on Rsch. & Dev. in Info. Retrieval (“SIGIR 2019”) 1089-92 (2019).
 7. Gordon V. Cormack, Haotian Zhang, Nimesh Ghelani, Mustafa Abualsaud, Mark D. Smucker, Maura R. Grossman, Shahin Rahbariasl, and Amira Ghenai, *Dynamic Sampling Meets Pooling*, Proc. of the 42nd Int’l ACM SIGIR Conference on Rsch. & Dev. in Info. Retrieval (“SIGIR 2019”) 1217-20 (2019).
 8. Mustafa Abualsaud, Nimesh Ghelani, Haotian Zhang, Mark D. Smucker, and Maura R. Grossman, *A System for Efficient High-Recall Retrieval*, Proc. of the 41st Int’l ACM SIGIR Conference on Rsch. & Dev. in Info. Retrieval (“SIGIR 2018”) 1317-20 (2018).

9. Gordon V. Cormack and Maura R. Grossman, *Beyond Pooling*, Proc. of the 41st Int'l ACM SIGIR Conference on Rsch. & Dev. in Info. Retrieval ("SIGIR 2018") 1169-72 (2018).
10. Gordon V. Cormack and Maura R. Grossman, *Technology-Assisted Review in Empirical Medicine: Waterloo Participation in CLEF eHealth 2018*, in L. Cappellato, N. Ferro, J.Y. Nie, and L. Soulier (eds.), Working Notes of CLEF 2018 – Conference and Labs in the Eval. Forum, Vol. 2125 Paper 89 (2018), CEUR Workshop Proc., CEUR-WS-org/Vol-2125 (2018).
11. Haotian Zhang, Mustafa Abualsaud, Nimesh Ghelani, Mark D. Smucker, Gordon V. Cormack, and Maura R. Grossman, *Effective User Interaction for High-Recall Retrieval: Less is More*, 27th Int'l Conference on Info. & Knowledge Mgmt. ("CIKM 2018") 187-96 (2018).
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79. Jeremy R. Feinberg and Maura R. Grossman, *Intro to Cloud Computing and Its Ethical Implications—Is There a Silver Lining?*, The N.Y. Prof'l Responsibility Report ("NYPRR"), 1, 7-10 (May 2010).
80. Maura R. Grossman, *N.Y. Unified Court System Releases E-Discovery Report With Recommendations That Bode Sweeping Changes for E-Discovery Management in State's Courts*, 10(4) Digital Discovery & E-Evidence Reports 83-4 (2010).
81. Maura R. Grossman, *New York State Unified Court System Releases E-Discovery Report – Recommendations Bode Sweeping Changes in E-Discovery Management*, Wachtell, Lipton, Rosen & Katz Client Memorandum (Mar. 22, 2010).
82. Ann Marie Gibbs, Maura R. Grossman, and Babette V.E. Orenstein, *Rule 45 Subpoenas and Non-Party Production Issues: Assessing the Burdens and Costs and Avoiding the Pitfalls*, 1-11 (Lorman Education Services 2010).
83. Maura R. Grossman, *"Utmost Seriousness" Necessary in Preservation of Electronic Evidence*, The Harvard L. School Forum on Corp. Gov. and Fin. Reg. (2 pages) (Feb. 16, 2010).
84. Maura R. Grossman and Hon. Ronald J. Hedges, *Do the Federal Rules Provide For Clawless "Clawbacks"?*, 9(9) Digital Discovery and E-Evidence (3 pages) (2009)
85. Hon. Ronald J. Hedges and Maura R. Grossman, *An Addendum to "Case Management and E-Discovery: Perfect Together?"*, 9(8) Digital Discovery & E-Evidence Report 262-63 (2009).
86. Peter C. Hein, Meyer G. Koplow, and Maura R. Grossman, *Implementation of Document Retention Policy Deemed Spoliation*, Wachtell, Lipton, Rosen & Katz Client Memorandum (Jan. 20, 2009).
87. Kevin F. Brady and Maura R. Grossman, *Mapping the Steps of the E-Discovery Process*, Georgetown Law E-Discovery Training Academy 1-4 (2009).
88. Peter C. Hein, Eric M. Roth, and Maura R. Grossman, *Federal Rule of Evidence 502, Limiting Waiver of Attorney-Client and Work-Product Privileges, Signed Into Law*, 26 Securities Reform Act. Litig. Reporter 49 (2008) and 41 Bank and Corp. Gov. L. Reporter 331 (2008).
89. Maura R. Grossman (primary drafter), *A Lawyer's Ethical Obligations to Retain and to Provide a Client with Electronic Documents Relating to a Representation*, The Ass'n of the Bar of the City of N.Y. Committee on Prof'l and Judicial Ethics Formal Op. 2008-1 1-7 (July 2008).
90. Peter C. Hein, Eric M. Roth, Maura R. Grossman, and Danielle L. Rose, *Proposed Rule of Evidence 502, Limiting Waiver of Attorney-Client and Work-Product Privileges, Advances Towards Congressional Approval*, Wachtell, Lipton, Rosen & Katz Client Memorandum (Dec. 26, 2007).

91. Maura R. Grossman (primary drafter), *Corporate-Family Conflicts, Duty of Loyalty, and Duty to Preserve Confidences and Secrets*, The Ass'n of the Bar of the City of N.Y. Committee on Prof'l and Judicial Ethics Formal Op. 2007-3 1-7 (Sept. 2007).

PRESENTATIONS, SEMINARS, AND WEBINARS 2008 – PRESENT

As a practicing lawyer, much of my scholarly work has been in the form of talks in various settings, including training sessions for judges and government lawyers, and presentations at law schools, bar association events, and industry conferences.

2020 TALKS

1. “The Mathematics of eDiscovery,” with Matthew Mahon and Michael Quartararo, Association of Certified eDiscovery Specialists (“ACEDS”) Webinar (Jan. 28, 2020).
2. “Emerging Technologies in Litigation,” with Hon. Melissa Crane, Hon. Katherine Forrest, Gail Gottehrer, and Kan Nawaday, Commercial and Federal Litigation Section Meeting at the New York State Bar Association (“NYSBA”) Annual Meeting (New York, NY Jan. 29, 2020).
3. “An Introduction to Technology-Assisted Review for eDiscovery,” Guest Lecture at Tessa Jacobs’ and Robin Stewart’s Electronic Discovery Course at the University of Missouri–Kansas City Law School (Feb 18, 2019).
4. “Artificial Intelligence (‘AI’) to Support the Practice of law,” with Hon. David Gerston, Phillip A. Gold, Hon. Hon. Ronald J. Hedges, and Jason Kairilla, Artificial Intelligence in Courtroom Practice: What Lawyers and Judges Need to Know, The National Judicial College, American Board of Trial Advocates (“ABOTA”) – Miami Chapter, Dade County Bar Association, and Miami Dade Trial Lawyers Association (Miami, FL Feb. 27, 2020).
5. “Judges and Artificial Intelligence (‘AI’), with Hon. Jennifer Bailey, Hon. David Gerston, Hon. Ronald J. Hedges, Hon. Miguel de la O, Richard DeNapoli, and Hon. Daryl Trawick Artificial Intelligence in Courtroom Practice: What Lawyers and Judges Need to Know, The National Judicial College, American Board of Trial Advocates (“ABOTA”) – Miami Chapter, Dade County Bar Association, and Miami Dade Trial Lawyers Association (Miami, FL Feb. 27, 2020).
6. “Bias in Data-Driven Decision-Making,” Privacy, Infrastructures, Policy (“PIP”) Conference, University of Waterloo (Waterloo, ON Feb. 28, 2020).
7. “Lessons in Leadership: Innovating When Innovation Isn’t Welcome,” Keynote at the Women in Data Science Conference 2020 (“WiDS@Ottawa”) (Ottawa, ON Mar. 2, 2019).
8. “Ethics, Artificial Intelligence, and Society,” with Fawn Annan, Karen Eltis, Sarah Tatsis, and Carolyn Watters,” Panel at the Women in Data Science Conference 2020 (“WiDS@Ottawa”) (Ottawa, ON Mar. 2, 2019).
9. “eDiscovery Special Masters: The Good, the Bad, and the Ugly,” with Jeannine Kenney and Hon. Kristen L. Mix, Ninth Annual Arizona State University (“ASU”) –Arkfeld eDiscovery and Digital Evidence Conference (Phoenix, AZ Mar. 11, 2019).

10. “ESI Search Strategies: Determining What’s Right for Your Case,” with Tessa Jacob and Anne Kershaw, Ninth Annual Arizona State University (“ASU”) –Arkfeld eDiscovery and Digital Evidence Conference (Phoenix, AZ Mar. 12, 2019).
11. “Hot Topics in Electronic Discovery: Fundamentals of Technology-Assisted Review,” Guest Lecture at John Tsiforas’ Computer Technology in Legal Practice Course, Maurice A. Deane School of Law at Hofstra University (Mar. 19, 2020).
12. “Fundamentals of Technology-Assisted Review,” Guest Lecture at Craig Ball’s Electronic Discovery and Digital Evidence Course at the University of Texas at Austin School of Law (Apr. 6, 2020).
13. “Artificial Intelligence and the Law: Real Benefits and Challenges,” Guest Lecture at Brian Donnelly’s and Conrad A. Johnson’s Lawyering in the Digital Age (“LDA”) Clinic Course at Columbia Law School (Apr. 16, 2019).
14. “Remote Teaching and Assessment,” with Carmen Bruni, Craig Kaplan, Ian McKillop, Naomi Nishimura, and Dave Tompkins, David R. Cheriton School of Computer Science, University of Waterloo (Apr. 29, 2020).
15. “Rebooting: Security and Data Privacy Considerations,” with Deborah Evans, Plinio Morita, Michele Mosca, Michael Parker, and Douglas Stebila, The Gateway for Enterprises to Discover Innovation (“GEDI”) at the University of Waterloo Post-COVID-19 Reboot Panel Series (June 2, 2020).
16. “Hot Topics in Electronic Discovery: Fundamentals of Technology-Assisted Review,” Guest Lecture at John Tsiforas’ Computer Technology in Legal Practice Course, Maurice A. Deane School of Law at Hofstra University (June 9, 2020).
17. “The ACEDS Roundtable Series: Transitions, Transformations, and Triumphs in 2020,” with Ari Kaplan, Patricia LeBel-Lasse, Joy Murao, Michael Quartararo, and George Socha Association of eDiscovery Specialists (“ACEDS”) Webinar (July 15, 2020).
18. “The Battle Against COVID-19: How eDiscovery Software is Playing a Role,” with Sharon D. Nelson and John W. Simek, 117th Edition of Digital Detectives Podcast on Legal Talk Network (July 15, 2020).
19. “TAR Unstuck: Everything You Ever Wanted to Know About Technology-Assisted Review,” Georgetown Law Executive and Continuing Legal Education (“CLE”) Law and Technology Forum (July 22, 2020).
20. “Fundamentals of Artificial Intelligence and Issues of Bias,” Georgetown Law Executive and Continuing Legal Education (“CLE”) Law and Technology Forum (July 22, 2020).
21. “New Technologies: How Attorneys and Their Clients Might Evaluate New Technologies to Decide Whether to Adopt,” with Sarah Gold and Hon. Ronald J. Hedges, New York State Bar Association (“NYSBA”) Summer Webinar Series (July 23, 2020).
22. “Diversity and Inclusion in Legal Tech Education,” Virtual SubTech 2020 BIG IDEA Talk (July 16, 2020).
23. “Fundamentals of Artificial Intelligence and Issues of Bias,” Association of eDiscovery Specialists (“ACEDS”) Detroit Chapter Webinar (Aug. 4, 2020).

24. “Welcome to the Machine: AI in the Archives,” with Sharmila Bhatia, Roger Christman, Gordon V. Cormack Cal Lee, and Brent M. West, 2020 Joint Meeting of the Council of State Archivists (“CpSA”) /Society of American Archivists (“SAA”) Annual Meeting (Aug. 7, 2020).
25. “Checklist for Choosing an eDiscovery Solution,” with Carolyn Anger and James A. Gill, Ipro Tech and Association of Certified eDiscovery Specialists (“ACEDS”) Webinar (Aug. 13, 2020).
26. “Fundamentals of Artificial Intelligence and Issues of Bias,” Continuing Legal Education (“CLE”) Program for the U.S. Department of Justice (“DOJ”) Civil Division (forthcoming Aug. 19, 2020).
27. “Special Masters in Litigation,” with Hon. Frank Maas, Hon. Kristen L. Mix, and Hon. Ira Warshawsky, Zapproved Preservation Excellence (“PREX”) Summit Series (Aug. 25, 2020).
28. “Artificial Intelligence and Algorithms,” Guest Lecture at Mark Berman’s Technology and the Legal Profession at Albany Law School (Sept. 1, 2020).
29. “Fundamentals of Artificial Intelligence and Issues of Bias, New York State Bar Association (“NYSBA”) Committee on Technology and the Legal Profession Continuing Legal Education (“CLE”) Program (Sept. 10, 2020).
30. “Artificial Intelligence and Law,” with Hon. Paul W. Grimm, Duke University Law and Technology Program (Durham, NC Sept. 23 – 25, 2020).
31. “eDiscovery and Technology-Assisted Review in the Civil and Criminal Contexts,” ,” Guest Lecture at Mark Berman’s Technology and the Legal Profession at Albany Law School (Oct. 20, 2020).
32. “Advanced Topics in Technology-Assisted Review,” Continuing Legal Education (“CLE”) Program for the U.S. Department of Justice (“DOJ”) Civil Division (Nov. 4, 2020).
33. “Wandering Off the Beaten Path: TAR for COVID-19 and Beyond,” with Gordon V. Cormack, Georgetown Advanced eDiscovery Institute (Nov. 13, 2020).
34. “Technology Accelerators,” with Matt Maslow and Chuck Rothman, 2020 Digital Evidence and eDiscovery Institute, Co-Sponsored by the Ontario Bar Association (“OBA”) Digital Evidence and eDiscovery Working Group and Sedona Canada (Nov. 25, 2020).

2019 TALKS

35. “The Great Debate,” with Jake Heller, Thomas J. Hamilton, Lee J. Tiedrich, and Richard Tromans, ALM Media LLC Legalweek Workshop A – AI Bootcamp 2.0 (New York, NY Jan. 28, 2019).
36. “The Use of Special Masters and E-Discovery Mediators in Connection with Court Litigation,” with Mark Berman, Jeremy Feinberg, Hon. Shirley Werner Kornreich, and Hon. Frank Maas, Joint New York State Bar Association (“NYSBA”) /JAMS Continuing Legal Education (“CLE”) Program on Resolving E-Discovery Disputes Efficiently in Arbitration and in Court (New York, NY Jan. 28, 2019).
37. “Access to Justice: Substantial Challenges and How You, the Law, and Technology Can Help,” with David Horrigan, Zabrina Jenkins, Hon. Tanya R. Kennedy, Hon. Xavier Rodriguez, and James Sandman, Data Discovery 2019: Challenges for Business and Society—With Answers from Law and Technology Track at Legaltech 2019 (New York, NY Jan. 30, 2019).

38. “AI Fundamentals: Impact on the Legal Profession,” Guest Lecture at Mark A. Berman and Joe Rosenberg’s Course on Technology and the Law: No Expertise Required, City University of New York (“CUNY”) School of Law (Long Island City, NY Jan. 30, 2019).
39. “Artificial Intelligence and Law: Genuine Benefits and Challenges,” Guest Lecture at Karen Eltis’ University of Ottawa Faculty of Law Internet/Cyber Law Course (Ottawa, ON Feb. 7, 2018).
40. “Artificial Intelligence and Law: Real Benefits and Challenges: Session I,” Annual Toronto Youth STEM and Innovation (“TYSI”) Conference (Toronto Feb. 19, 2019).
41. “Artificial Intelligence and Law: Real Benefits and Challenges: Session II,” Annual Toronto Youth STEM and Innovation (“TYSI”) Conference (Toronto Feb. 19, 2019).
42. “AI Update: What Works, What Doesn’t, Questions to Ask, and Thorny Legal Issues,” with William (“Bill”) Kellerman and Gary Merchant, Eighth Annual Arizona State University (“ASU”) – Arkfeld eDiscovery Conference (Phoenix, AZ Mar. 6 – 8, 2019).
43. “Artificial Intelligence in Law: Real Benefits and Challenges,” Keynote Address at Eighth Annual Arizona State University (“ASU”) – Arkfeld eDiscovery Conference (Phoenix, AZ Mar. 6 – 8, 2019).
44. “TAR Unstuck: Choosing the Right Tool, Using It Wisely, and Negotiating an Effective TAR Protocol,” with Tessa Jacobs and Jeannine M. Kenney, Eighth Annual Arizona State University (“ASU”) – Arkfeld eDiscovery Conference (Phoenix, AZ Mar. 6 – 8, 2019).
45. “An Introduction to Technology-Assisted Review for eDiscovery,” Guest Lecture at Tessa Jacobs’ Electronic Discovery Course at the University of Missouri–Kansas City Law School (Mar. 12, 2019).
46. “Promoting and Increasing Adoption of TAR in Your Organization,” with Michallynn Demiter and Jeff Gilles, International Legal Technology Association (“ILTA”) Webinar (Mar. 21, 2019).
47. “Understanding Automated Decision-Making for Lawyers: Code and Data,” Opening Presentation at The Citizen Lab, Law Commission of Ontario, and International Human Rights Forum on Automated Decision-Making in the Criminal Justice System (Toronto, ON Mar. 22, 2019).
48. “Hot Topics in Electronic Discovery,” Guest Lecture at John Tsiforas’ Computer Technology in Legal Practice at the Maurice A. Deane School of Law at Hofstra University (Mar. 25, 2019).
49. “eDiscovery and Technology-Assisted Review,” with Hon. James C. Francis, IV, Guest Lecture at Mark A. Berman and Joe Rosenberg’s Course on Technology and the Law: No Expertise Required, City University School of Law (Long Island City, NY Mar. 27, 2019).
50. “Fundamentals of Technology-Assisted Review,” Guest Lecture at Craig Ball’s Electronic Discovery and Digital Evidence Course at the University of Texas at Austin School of Law (Apr. 1, 2019).
51. “Lessons in Leadership: Leading the Way on Rocky Terrain,” Plenary Session at the New York Information Technology (“IT”) Leadership Academy (Albany, NY Apr. 4, 2019).
52. “Artificial Intelligence and the Law: Real Benefits and Challenges,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age (“LDA”) Clinic Course at Columbia Law School (Apr. 11, 2019).

53. “The Legal and Ethical Implications of Artificial Intelligence,” Plenary Session at the Federal Judicial Center (“FJC”) Magistrate Judges’ National Workshop No. 1 (Miami, FL Apr. 16, 2019).
54. “Helping the Medicine Go Down: Teaching Across C.P. Snow’s Two Cultures, with Scott Campbell, Doreen Fraser, and Paul Heidbrecht, University of Waterloo Teaching and Learning Conference (Waterloo, ON May 2, 2019).
55. “A Candid Conversation with U.S. Magistrate Judge Kristen L. Mix,” at Deloitte Federal Discovery’s 2019 Electronic Discovery Symposium for Government Agencies (Washington, DC May 7, 2019).
56. “Machine Learning in Operations: Lessons Learned From the TAR Journey,” with Ian Wilson, Corporate Legal Operations Consortium (“CLOC”) 2019 Vegas Fourth Annual Institute (Las Vegas, NV May 14 – 16, 2019).
57. “Fundamentals of Technology-Assisted Review (‘TAR’),” Legal Technology Education Society of Alberta (“LESA”) 2019 Legal Technology Conference (Edmonton, Alberta May 24, 2019).
58. “Proportionality in eDiscovery – From Mobile Devices to TAR: Exploring Proportionality From Both Legal and Technological, with Woods Abbott, Jonathan Sablone, and George Socha, Second Annual New England Legal Technology Professionals (“NETLP”) Connect Conference (Boston, MA May 30, 2019).
59. “Academy Overview,” with Craig Ball, Hon. John M. Facciola, and Tom O’Connor, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 2, 2019).
60. “History of eDiscovery and the New Rules,” with Craig Ball, Hon. John M. Facciola, and Tom O’Connor, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 2, 2019).
61. “Coaches Corner: Meet and Confer Strategies,” with Craig Ball, Hon. John M. Facciola, and Tom O’Connor, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 3, 2019).
62. “Law of Collections and Forms of Production I,” with Hon. John M. Facciola and Mark S. Sidoti, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 4, 2019).
63. “Law of Collections and Forms of Production II,” with Hon. John M. Facciola and Mark S. Sidoti, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 4, 2019).
64. “Fundamentals of Technology-Assisted Review (‘TAR’) for eDiscovery,” Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 5, 2019).
65. “TAR Exercises,” with Gordon V. Cormack, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 5, 2019).
66. “The Courts and TAR: Where Are They and Where They Are Going,” with Craig Ball, Hon. John M. Facciola, and Mark S. Sidoti, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 5, 2019).
67. “Mock 30(b)(6) IT Witness Depositions and Discussion,” with Gordon V. Cormack, Hon. John M. Facciola, Tom O’Connor, and Mark S. Sidoti, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 6, 2019).

68. “Federal Rule of Evidence 502,” with Hon. John M. Facciola and Mark S. Sidoti, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 6, 2019).
69. “Privacy and eDiscovery Process From a National and International Perspective,” with Hon. John M. Facciola and Mark S. Sidoti, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 6, 2019).
70. “Ethics,” with Hon. John M. Facciola and Mark S. Sidoti, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 6, 2019).
71. “Mock 26(f) Conference,” with Hon. Paul W. Grimm, Georgetown University Law Center eDiscovery Training Academy 2019 (Washington, DC June 7, 2019).
72. “Celebrating Women in Computer Science: An Interview with Turing Award Laureates Shafi Goldwasser and Barbara Liskov,” University of Waterloo Turing Symposium and Celebration of Women in Computer Science (Waterloo, ON June 13, 2019).
73. “Wo(man) and Machine – Who Makes the Decisions and Why,” with Rozita Dara, Sheldon Fernandez, Lynda Partner, Neil Randall, and Sarah Shortreed, Waterloo Regional Chapter of Women in Communications and Technology (“WCT”) (June 25, 2019). [5:30 – 8:30 PM; Accelerator Centre on Hagey Boulevard, West Entrance, 1st Floor]
74. “Fundamentals of Artificial Intelligence – Algorithms and Oppression,” Guest Lecture at Mark A. Berman’s and Deborah S. Kerr’s Course on Emerging Technology and the Practice of Law, Syracuse Law School (Sept. 12, 2019).
75. “Leadership: The Role of Special Masters in eDiscovery,” with Craig Ball, Jonathan Redgrave, and Hon. Shira A. Scheindlin, Zapproved’s Preservation Excellence (“PREX”) 2019 Conference (Chicago, IL Sept. 17 – 19, 2019).
76. “Leadership: Judicial Forum – Lightning Round with the Judges,” with Hon. Ronal J. Hedges, Hon. Elizabeth Laporte, Hon. Frank Maas, Hon. Andrew J. Peck, and Hon. Xavier Rodriguez, Zapproved’s Preservation Excellence (“PREX”) 2019 Conference (Chicago, IL Sept. 17 – 19, 2019).
77. “Artificial Intelligence and the Law: Real Benefits and Challenges,” Keynote Address at Fourth Annual Association of Certified eDiscovery Specialists (“ACEDS”) Detroit Symposium – Midwest eDiscovery Conference (Detroit, MI Sept. 27, 2019).
78. “Best Practices and Strategies for Technology-Assisted Review (“TAR”),” U.S. Department of Justice (“DOJ”) Civil Division (Washington, DC Oct. 16, 2019).
79. “eDiscovery and Technology-Assisted Review in Civil and Criminal Proceedings,” with Emma M. Greenwood, Guest Lecture at Mark A. Berman’s and Deborah S. Kerr’s Course on Emerging Technology and the Practice of Law, Syracuse Law School (Oct. 17, 2019).
80. “Teaching Across Two Cultures: Bridging the Gap Between Computer Science and Law,” Lightning Talk at University of Waterloo Summit on Responsible Innovation and Technology (Waterloo, ON Oct. 23, 2019).

81. “Artificial Intelligence and the Law: Real Benefits and Challenges,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age (“LDA”) Clinic Course at Columbia Law School (Oct. 24, 2019).
82. “Plenary 1: Forward to the Future: Legal and Ethical Implications of Artificial Intelligence,” Southern District of Texas Bench and Bar Conference (Houston, TX Oct. 29, 2019).
83. “Civil Breakout 1: Drilling Down – ESI Issues That Impact Civil Practice,” with Zenobia Harris Bivens, Southern District of Texas Bench and Bar Conference (Houston, TX Oct. 29, 2019).
84. “Lessons in Leadership: Leading the Way on Rocky Terrain,” ACM Canadian Celebration of Women in Computing (“CAN-CWIC 2019”) (Mississauga, ON Nov. 9, 2019).
85. “Introduction and Overview: What is Artificial Intelligence / Machine Learning / Automated Decision-Making, and Why Should We Care?,” Law Society of Ontario 2019 Special Lectures Program (Toronto, ON Nov. 21, 2019).
86. “Lessons in Leadership: Leading the Way on Rocky Terrain,” Keynote Address at Waterloo WatITis 2019 Conference (Waterloo, ON Dec. 4, 2019).

2018 TALKS

87. “An Introduction to Electronic Discovery,” Topics in Electronic Discovery, Georgetown University Law Center Spring 2018 Week One Upper-Class JD and LLM Course (Washington, DC Jan. 8, 2018).
88. “The 2015 Federal Rules Amendments – Two Years Later and Counting” and “An Introduction to Federal Rule of Evidence 502,” Topics in Electronic Discovery, Georgetown University Law Center Spring 2018 Week One Upper-Class JD and LLM Course (Washington, DC Jan. 9, 2018).
89. “An Introduction to Search and Review in eDiscovery,” Topics in Electronic Discovery, Georgetown University Law Center Spring 2018 Week One Upper-Class JD and LLM Course (Washington, DC Jan. 10, 2018).
90. “Trending Now: #Competence, #Cooperation, #Social Media, and . . .,” Topics in Electronic Discovery, Georgetown University Law Center Spring 2018 Week One Upper-Class JD and LLM Course (Washington, DC Jan. 11, 2018).
91. “2018 Update on Ethics in Litigation,” with Hon. Ronald J. Hedges, Shawndra G. Jones, and Amy Walker Wagner, American Law Institute Continuing Legal Education (“ALI-CLE”) Webcast (Jan. 16, 2018).
92. “ESI for Dummies: What Every Legal Team Should Know – The Lawyer’s Guide to ESI and Forensics 101,” with Nicholas P. Chrysanthem, Michael L. Fox, and Hon. Ronald J. Hedges, New York State Bar Association 2018 Annual Meeting, LPM Day – Hot Topics in Law Practice Management (New York, NY Jan. 25, 2018).
93. “Presentation of the Honorable Shira Scheindlin Lifetime Achievement Award to the Honorable Craig B. Shaffer,” Zapproved Corporate E-Discovery Hero Awards Ceremony (New York, NY Jan. 29, 2018).
94. “Fostering AI Innovation in Canada,” with Marcus Brubaker, Mayor Jeff Lehman, Victor Garcia, Vinay Mehta, and Greg Wooton, Osgoode Intellectual Property Law and Technology Program Round Table

Discussion on Bracing for Impact – The Artificial Intelligence Challenge: A Roadmap for AI Governance in Canada, (Toronto, ON Feb. 1, 2018).

95. “AI for Social Good,” with David Lepofsky, Brandie M. Nonnecke, Guy Sediman, Bob Tarantino, and Jutta Treviranus, Osgoode Intellectual Property Law and Technology Conference on Bracing for Impact – The Artificial Intelligence Challenge: A Roadmap for AI Governance in Canada, (Toronto, ON Feb. 2, 2018).
96. “Data Disarmament: A Fireside Chat with Cathy O’Neil on the Ethical Challenges of AI,” with Cathy O’Neil (Waterloo, ON Feb. 8, 2018).
97. “Fundamentals of Electronic Discovery and Technology-Assisted Review,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age (“LDA”) Clinic Course at Columbia Law School (Feb. 15, 2018).
98. “An Introduction to Technology-Assisted Review for eDiscovery,” Guest Lecture at Tessa Jacobs’ Electronic Discovery Course at the University of Missouri–Kansas City Law School (Feb. 27, 2018).
99. “Applying What We Have Learned from ‘eDiscovery 1.0’ to New and Evolving Legal Challenges,” with Jerone J. English, The 12th Annual Sedona Conference Institute (“TSCI”) on Applying eDiscovery Skills and Technologies to All Areas of the Law (Nashville, TN Mar. 1, 2018).
100. “Using Data Analytics and Metrics to Achieve Proportionality,” with Gareth Evans, Phil Favro, Hon. Leda Wettre, The 12th Annual Sedona Conference Institute (“TSCI”) on Applying eDiscovery Skills and Technologies to All Areas of the Law (Nashville, TN Mar. 1, 2018).
101. “Artificial Intelligence, Ethics, and the Law,” with Nicolas Economou, Mark Hedegus, and Jeremy Kemnitz, The 12th Annual Sedona Conference Institute (“TSCI”) on Applying eDiscovery Skills and Technologies to All Areas of the Law (Nashville, TN Mar. 2, 2018).
102. “Algorithms, Machine Learning, and Artificial Intelligence – The Myth and the Hype,” with Michael Arkfeld and Thomas I. Barnett, Seventh Annual Arizona State University (“ASU”) – Arkfeld eDiscovery & Digital Evidence Conference on Gaining an Edge: Law, Technology, and Analytics (Phoenix, AZ Mar. 6, 2018).
103. “The Nuts and Bolts of Negotiating a Technology-Assisted Review (TAR) Protocol,” with Robert Brownstone, Bruce Hedin, and Hon. Andrew J. Peck, Seventh Annual Arizona State University (“ASU”) – Arkfeld eDiscovery & Digital Evidence Conference on Gaining an Edge: Law, Technology, and Analytics (Phoenix, AZ Mar. 7, 2018).
104. “What Attorney Competence Means When It Comes to Handling Electronically Stored Information,” with Hon. Ronald J. Hedges, Shawndra G. Jones, and Hon. Lisa Margaret Smith, NYSBA Ethics in the Digital Age (New York, NY Mar. 13, 2018).
105. “The Do’s and Don’ts of Attorney Social Media Use and Advice to Clients: AN Overview of the Rules of the Road,” with Michael L. Fox, Ignatius A. Grande, and Scott L. Malouf, NYSBA Ethics in the Digital Age (New York, NY Mar. 13, 2018).
106. “An Introduction to Technology-Assisted Review for eDiscovery,” Guest Lecture at Hon. James C. Francis IV Electronic Discovery Course at City University of New York (Long Island City, NY Mar. 15, 2018).

107. “An Introduction to Electronic Discovery,” with Mark A. Berman, Guest Lecture at John Tsiforas’ Computer Technology in Legal Practice at the Maurice A. Deane School of Law at Hofstra University (Hempstead, NY Mar. 19, 2018).
108. “What is Artificial Intelligence (“AI”)? How Does It Work? What Are the Potential Implications of AI in General, and for Your Practice,” With Allison Arden Besunder and Kathryn Hume, New York State Bar Association Technology and the Legal Profession Spring 2018 Artificial Intelligence Webinar Series (Mar. 21, 2018).
109. “Your Computer is Smarter and Faster Than You: Using Technology-Assisted Review in Your Litigation Practice to Increase Efficiency and Reduce eDiscovery Costs,” University of Nebraska College of Law Continuing Legal Education (“CLE”) Program (Omaha, NE Mar. 28, 2018).
110. “The Basics of eDiscovery, or How to Make Yourself Invaluable as an Associate from Day 1 By Learning Something No One Else at Your Firm Understands, Guest Lecture at University of Nebraska-Lincoln College of Law (Lincoln, NE Mar. 29, 2018).
111. “Artificial Intelligence, Real Benefits and Challenges,” Consilio Women’s Power Summit CLE and Red Door Spa Event (New York, NY Apr. 12, 2018).
112. “Nonconsensual Porn (Revenge Porn)” with Carrie Goldberg, Elisa D’Amico, Andrew Sta. Ana, and Ari Ezra Waldman, National Association of Women Judges Mid-Year Conference (Brooklyn, NY Apr. 13, 2018).
113. NYSBA AI Webinar in The Growing Use of Artificial Intelligence Applications in the Legal Profession and Their Potential Impact on Your Legal Practice, with Daniel Meyers and Scott Reents (Apr. 18, 2018).
114. “Resolving E-Discovery Disputes Efficiently in Arbitration and in Court,” with Mark A. Berman, Hon. Jeremy Feinberg, and Hon. Frank Maas, Continuing Legal Education (“CLE”) Program Co-Sponsored by JAMS and the Commercial and Federal Litigation Section of the New York State Bar Association (New York, NY Apr. 25, 2018).
115. “Where Waterloo Meets AI-Ethics,” with Sheldon Fernandez, Leah Govia, and Kate Larson, University of Waterloo Alumni and Donors Event (Mississauga, ON Apr. 26, 2018).
116. “Artificial Intelligence, Real Benefits and Ethical Challenges,” The Sedona Conference Track at the 17th Annual IPRO Innovations Conference 2018 (Scottsdale, AZ Apr. 30, 2018).
117. “Preparing for and Responding to Internal and Government Investigations,” with Jerami D. Kemnitz, Glenn Melcher, David Shonka, The Sedona Conference Track at the 17th Annual IPRO Innovations Conference 2018 (Scottsdale, May 1, 2018).
118. “Technology-Assisted Review for eDiscovery,” with William (“Bill”) Hamilton and Hon. Gary R. Jones, Eleventh Circuit Biannual Judicial Conference (Ponte Vedra Beach, FL May 3-4, 2018).
119. “Artificial Intelligence: Genuine Benefits and Challenges,” part of panel on Civil Claims in the Era of Automation and Artificial Intelligence, with Jeremy de Beer and Evan Thomas, National Judicial Institute Civil Law Seminar: Resistance is Futile – The Technological Transformation of Substantive and Procedural Civil Law, Evidence, and the Administration of Civil Justice (St. John’s, NL May 9, 2018).

120. "A Candid Conversation with U.S. District Judge Paul W. Grimm," with Hon. Paul W. Grimm, Deloitte Eleventh Annual Electronic Discovery Symposium for Government Agencies (Washington, DC May 10, 2018).
121. "Attorney Algorithm Aversion and Infatuation," Georgetown University Law Center / Exterro edTalk (May 16, 2018).
122. "Inside the Black Box: Search, Artificial Intelligence, and Ethics," with John Barkett and James Zucker, American Bar Association ("ABA") 12th Annual National Institute on eDiscovery Conference (Chicago, IL May 18, 2018).
123. "Academy Overview," with Craig D. Ball and Hon. John M. Facciola, Georgetown eDiscovery Training Academy (Washington, DC June 3, 2018).
124. "Practicum on eDiscovery Planning," with Craig D. Ball and Hon. John M. Facciola, Georgetown eDiscovery Training Academy (Washington, DC June 3, 2018).
125. "Law of Collections and Forms of Production – Part I," with Hon. John M. Facciola and Mark S. Sidoti, Georgetown eDiscovery Training Academy (Washington, DC June 5, 2018).
126. "Law of Collections and Forms of Production – Part II," with Hon. John M. Facciola and Mark S. Sidoti, Georgetown eDiscovery Training Academy (Washington, DC June 5, 2018).
127. "Fundamentals of Technology-Assisted Review," Georgetown eDiscovery Training Academy (Washington, DC June 6, 2018).
128. "TAR Exercises," with Gordon V. Cormack, Georgetown eDiscovery Training Academy (Washington, DC June 6, 2018).
129. "The Courts and TAR: Where Are They and Where They Are Going," with Craig D. Ball, Hon. John M. Facciola, and Mark S. Sidoti, Georgetown eDiscovery Training Academy (Washington, DC June 6, 2018).
130. "Mock 30(b)(6) IT Witness Deposition and Discussion," with Craig D. Ball, Gordon V. Cormack, Hon. John M. Facciola, and Mark S. Sidoti, Georgetown eDiscovery Training Academy (Washington, DC June 7, 2018).
131. "Federal Rule of Evidence 502," with Hon. John M. Facciola and Mark S. Sidoti, Georgetown eDiscovery Training Academy (Washington, DC June 7, 2018).
132. "Privacy and Regulation of the eDiscovery Process: The Stored Communications Act, Carpenter and Its Implications, Sovereign Power, and the General Data Protection Regulation," with Hon. John M. Facciola, Georgetown eDiscovery Training Academy (Washington, DC June 7, 2018).
133. "Mock 26(f) Conference I," with Hon. John Anderson, Georgetown eDiscovery Training Academy (Washington, DC June 8, 2018).
134. "Mock 26(f) Conference II," with Hon. John Anderson, Georgetown eDiscovery Training Academy (Washington, DC June 8, 2018).

135. “Artificial Intelligence in Law,” RSM Canada’s Business Professional Services Law Firm Dinner (Toronto, ON June 13, 2018).
136. “Artificial Intelligence and the Legal Profession,” with Mark Bowman and R. Douglas Vaughn, 2018 Annual Meeting of the International Association of Defense Counsel (“IADC”) (Lisbon, Portugal July 9, 2018).
137. “eDiscovery for Every Litigator,” Half-Day Continuing Legal Education (“CLE”) Program for Kessler, Topaz, Meltzer & Check (Radnor, PA Aug. 23, 2018).
138. “The Quest for Total Recall,” with Gordon V. Cormack, Keynote Address at the Eighteenth ACM Symposium on Document Engineering (“DocEng 2018”) (Halifax, Nova Scotia Aug. 29, 2018).
139. “Update on Technology-Assisted Review: Advances and Challenges,” with Gil Keteltas and Ashish S. Prasad, Hot Topics in Electronic Discovery 2018: What Corporate and Outside Counsel Need to Know, Practising Law Institute (“PLI”) Conference (New York, NY Sept. 17, 2018).
140. “Fundamentals of Technology-Assisted Review,” Guest Lecture at Hon. Xavier Rodriguez’s Electronic Discovery Course at St. Mary’s University School of Law (San Antonio, TX Sept. 20, 2018)
141. “Artificial Intelligence in Legal Applications,” with Kathryn Hume and Sondra Rebenchuk, Canadian Association of General Counsels (Las Vegas, NV Sept. 21, 2018).
142. “An Overview of AI and Other Emerging Legal Technologies,” with Craig Boise, Chris Martin, Kathleen Turland, and David Zumpano, Syracuse University College of Law Symposium on Artificial Intelligence, Advanced Technologies, and the Practice of Law (Syracuse, NY Sept. 27, 2018).
143. “The Role and Implications of AI and Emerging Technologies in Law Practice,” with Craig Boise, Christine Hasiotis, Chris Martin, Kathleen Turland, and David Zampano, Syracuse University College of Law Symposium on Artificial Intelligence, Advanced Technologies, and the Practice of Law (Syracuse, NY Sept. 27, 2018).
144. Keynote Address on Blueprint to the Future: Disruptive Technology, University of Waterloo Faculty of Science (14th Annual) 2018 Fusion Conference (Waterloo, ON Sept. 29, 2018).
145. “Fundamentals of Electronic Discovery and Technology-Assisted Review,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age (“LDA”) Clinic Course at Columbia Law School (Oct. 4, 2017).
146. “What is Societal Computing and Why Should You Care,” with Robin Cohen and Srinivasan Keshav, Women in Computer Science (“WiCS”) Event (Waterloo, ON Oct. 12, 2018).
147. “Fundamentals of eDiscovery and Electronically Stored Information (‘ESI’) – Part I,” National Judicial College General Jurisdiction/Special Courts: Advanced Programs (Reno, NV Oct. 18, 2018).
148. “Fundamentals of eDiscovery and Electronically Stored Information (‘ESI’) – Part II,” National Judicial College General Jurisdiction/Special Courts: Advanced Programs (Reno, NV Oct. 18, 2018).
149. “Ethics of Social Media,” National Judicial College General Jurisdiction/Special Courts: Advanced Programs (Reno, NV Oct. 18, 2018).

150. “Ethical and Other Challenges with Artificial Intelligence (“AI”), National Judicial College General Jurisdiction/Special Courts: Advanced Programs (Reno, NV Oct. 18, 2018).
151. “Not Magic—Science: The Science Behind CAL and Other TAR,” with Carolyn Anger and Jeff Gilles, International Legal Technology Association (“ILTA”) Webinar (Oct. 23, 2018).
152. “Fundamentals of Technology-Assisted Review,” Guest Lecture at Hon. James C. Francis IV’s Electronic Discovery Course at City University of New York Law School (Long Island City, NY Oct. 24, 2018).
153. “The Role of Special/eDiscovery Masters,” with Thomas C. Gricks, III, Hon. MaryBeth Kelly, Thomas Lidbury, and John Pappas, Third Annual Detroit Chapter and Inaugural Association of Certified eDiscovery Specialists (“ACEDS”) Midwest Regional eDiscovery Conference (Detroit, MI Oct. 26, 2018).
154. “What Attorney Competence Means When It Comes to Handling Electronically Stored Information and New Technologies,” with Hon. Ronald J. Hedges, Shawndra G. Jones, and Hon. Lisa Margaret Smith, New York State Bar Association Ethics in the Digital Age Continuing Legal Education (“CLE”) Program (New York, NY Nov. 1, 2018).
155. “An Overview of the Do’s and Don’ts of Attorney Social Media Use and Advice to Clients,” with Michael L. Fox, Ignatius A. Grande, and Scott L. Malouf, New York State Bar Association Ethics in the Digital Age Continuing Legal Education (“CLE”) Program (New York, NY Nov. 1, 2018).
156. “How to Deal with New Technology,” with Gail L. Gottehrer, Taa Grays, Hon. Ronald J. Hedges, and Hon. Matthew A. Sciarrino, Jr., New York State Bar Association Continuing Legal Education (“CLE”) Program (New York, NY Nov. 2, 2018).
157. “Artificial Intelligence and Other Technologies in the Legal Space,” with Benjamin Alarie, Xavier Beauchamp-Tremblay, and James Swanson, The Advocates’ Society Ontario eDiscovery Institute 2018 (Toronto, ON Nov. 6, 2018).
158. “Responsible AI,” with Courtney Doagoo, Ryan Robert Jenkins, and Donna Litt, Center for International Governance Innovation (“CIGI”) and Communitex/Open Data Exchange (“ODX”) Data Hub Sessions (Waterloo, ON Nov. 7, 2018).
159. “Artificial Intelligence, Genuine Benefits and Challenges: Is Your Computer a Better Lawyer Than You?,” with Hon. Kristen L. Mix, Martin Tully, and Jeremiah Weasenforth, Georgetown University Law Center Advanced eDiscovery Institute 2018 (Washington, DC Nov. 15, 2018).
160. “AI in Medicine Academic Panel,” with Philip Awadalla, Audrey Chung, Sunit Das, and Stephen MacKinnon, University of Waterloo 2018 Biotechnology and BioEngineering Conference (“BioTEC 2018”) (Waterloo, ON Nov. 17, 2018).
161. “AI in Law: The Quest for Total Recall,” Symposium at Technion Israel Institute of Technology (Haifa, Israel Nov. 21, 2018).
162. “Breakfast Roundtable Discussion on TAR,” with Roddy Bourke, Gordon V. Cormack, and Chris Dale at McCann Fitzgerald (Dublin, Ireland Nov. 29, 2018).

163. “Artificial Intelligence, Real Benefits and Challenges: Is Your Computer Becoming a Better Lawyer Than You?,” Keynote Address at La Touche Training eDiscovery and Information Governance Conference 2018 (Dublin, Ireland Nov. 30, 2018).
164. “Panel Discussion on Technology-Assisted Review,” with Chris Dale, Karyn Harty, and Kelly Atherton, La Touche Training eDiscovery and Information Governance Conference 2018 (Dublin, Ireland Nov. 30, 2018).
165. “Fundamentals of TAR,” Continuing Legal Education (“CLE”) Program at Capital One (Henricho, VA Dec. 6, 2018).

2017 TALKS

166. “An Introduction to eDiscovery: What is ‘ESI,’ What Makes It So Different from Paper, and What Role Does It Play in the Litigation Process?,” Georgetown University Law Center Spring 2017 First-Week Upper-Class JD and LLM Course on Topics in Electronic Discovery (Washington, DC Jan. 9, 2017).
167. “How Do the Federal Rules of Civil Procedure Related to eDiscovery Work, and What is Federal Rule of Evidence 502?,” Georgetown University Law Center Spring 2017 First-Week Upper-Class JD and LLM Course on Topics in Electronic Discovery (Washington, DC Jan. 10, 2017).
168. “Fundamentals of Search and Review in eDiscovery and Developing a Sound and Defensible Search and Review Process,” Georgetown University Law Center Spring 2017 First-Week Upper-Class JD and LLM Course on Topics in Electronic Discovery (Washington, DC Jan. 11, 2017).
169. “Selected Ethical and Other Issues in eDiscovery: Attorney Competence, Cooperation, Social Media, Bring Your Own Device, and The Internet of Things,” Georgetown University Law Center Spring 2017 First-Week Upper-Class JD and LLM Course on Topics in Electronic Discovery (Washington, DC Jan. 12, 2017).
170. “Technology-Assisted Review: Fact or Fiction?,” with Gordon V. Cormack, Spring 2017 E-Discovery Distinguished Speakers Series, University of Florida Levin College of Law International Center for Automated Information Retrieval (Gainesville, FL Feb. 20, 2017).
171. “More on Technology-Assisted Review,” Guest Lecture at William (Bill) Hamilton’s Electronic Discovery Course at the University of Florida Fredric G. Levin College of Law (Gainesville, FL Feb. 20, 2017).
172. “More on Technology-Assisted Review: Fact or Fiction?,” Guest Lecture at William (Bill) Hamilton’s Electronic Discovery Data Analysis and Review Course at the University of Florida Fredric G. Levin College of Law (Gainesville, FL Feb. 20, 2017).
173. “The Sedona Conference TAR Case Law Primer,” with Lea Malani Bays, Gareth Evans, Joseph P. Guglielmo, Hon. Andrew J. Peck, Sandra Rampersaud, and Kenneth J. Withers, The Sedona Conference Working Group 1 Webinar (Feb. 22, 2017).
174. “Fundamentals of Electronic Discovery and Technology-Assisted Review,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age (“LDA”) Clinic Course at Columbia Law School (Feb. 23, 2017).

175. “Best Practices in Preservation and Collection,” Continuing Legal Education (“CLE”) Program at ConocoPhillips (Houston, TX Mar. 1, 2017)
176. “Implementing Advanced Technology to Achieve the ‘Just, Speedy, and Inexpensive Determination of Every Action,’” with Gareth Evans, Tracy Greer, Robert Keeling, and Hon. Andrew J. Peck, 11th Annual Sedona Conference Institute (“TSCI”) Program on eDiscovery: Discovery in a Dynamic Digital World (Houston, TX Mar. 2, 2017).
177. “Ethical Dangers in Social Media,” with Denise E. Backhouse, Hon. Cathy Ann Bencivengo, and Kevin Brady, 11th Annual Sedona Conference Institute (“TSCI”) Program on eDiscovery: Discovery in a Dynamic Digital World (Houston, TX Mar. 3, 2017).
178. “Search II: Starting Off on the Right Foot with Technology-Assisted Review,” with Andrea D’Ambra, Alexander T. Goth, and Hal Marcus, Sixth Annual Arizona State University (“ASU”) – Arkfeld eDiscovery and Digital Evidence Conference on The New Normal: Law, Technology, and Innovation (Phoenix, AZ Mar. 8, 2017).
179. “The New Normal,” with Brad Harris, Thomas Morrissey, and Hon. Xavier Rodriguez, Sixth Annual Arizona State University (“ASU”) – Arkfeld eDiscovery and Digital Evidence Conference on The New Normal: Law, Technology, and Innovation (Phoenix, AZ Mar. 9, 2017).
180. “Report from the Arizona State University (“ASU”) – Arkfeld Legal Analytics and Big Data Workshop,” with Michael Arkfeld, Daniel M. Katz, and William Kellerman, Sixth Annual Arizona State University (“ASU”) – Arkfeld eDiscovery and Digital Evidence Conference on The New Normal: Law, Technology, and Innovation (Phoenix, AZ Mar. 10, 2017).
181. “Electronic Discovery – The Current State of Play as to the Scope of Electronic Discovery in the Courts and in Arbitration: What the Rules Say and What is Actually Happening,” with Sherman W. Kahn, Richard L. Mattiaccio, Hon. Shira A. Sheindlin, Steven Skulnik, and Hon. Ira B. Warshawsky, New York State Bar Association Joint Program on Cross Fertilization of Best Practices Recommendations by the Commercial and Federal Litigation and Dispute Resolution Sections for Improving Dispute Resolution in the Courts and in Arbitration, Fordham Law School (New York, NY Mar. 13, 2017).
182. “Fundamentals of Technology-Assisted Review,” Continuing Legal Education (“CLE”) Program at Holwell, Shuster & Goldberg LLP (New York, NY Mar. 15, 2017).
183. “Fundamentals of Technology-Assisted Review,” Guest Lecture at Tessa Jacobs’ Electronic Discovery Course at the University of Missouri–Kansas City Law School (Mar. 22, 2017).
184. “What Does Attorney Competence Mean When It Comes to Handling Electronic Discovery,” with Hon. Victoria A. Graffeo, Hon. Ronald J. Hedges, and Shawndra G. Jones, Legal Ethics in the Digital Age 2017, New York State Bar Association Commercial and Federal Litigation Section Program (New York, NY Mar. 30, 2017).
185. “The Do’s and Don’ts of Attorney Social Media Use and Advice to Clients: An Overview of the ‘Rules of the Road,’” with Michael L. Fox, Ignatius A. Grande, and Scott L. Malouf, Legal Ethics in the Digital Age 2017, New York State Bar Association Commercial and Federal Litigation Section Program (New York, NY Mar. 30, 2017).

186. “Ethics and Electronically Stored Information,” with Hon. Ronald J. Hedges and Shawndra G. Jones, American Law Institute (“ALI”) Continuing Legal Education (“CLE”) Live Video Webcast Program (Philadelphia, PA Mar. 31, 2017).
187. “Fundamentals of Technology-Assisted Review,” Guest Lecture at Joel Wuesthoff’s Topics in eDiscovery, Cybersecurity, and Forensics Course at the University of Maine School of Law Center for Law & Innovation (Portland, Maine April 7, 2017).
188. “Fundamentals of Technology-Assisted Review and Continuous Active Learning (CAL),” Continuing Professional Development (“CPD”) Program at Cassels Brock & Blackwell LLP (Toronto, ON Apr. 13, 2017).
189. “The Effect of Federal Rules Changes and New Technology, and Changes Needed to Resuscitate Class Actions,” with Stephen Burbank, Elizabeth Cabraser, Hon. Robert Dow Jr., Brian Fitzpatrick, Richard Marcus, and Darren Robbins, at the Institute for Law and Economic Policy (“ILEP”) and University of North Carolina Law Review 23rd Annual Symposium on Secrecy (Naples, FL Apr. 21, 2017).
190. “Understanding the Science and Mathematics Behind TAR,” with Kenneth J. Withers, Keynote for The Sedona Conference® Legal Track at IPRO “Innovations” 2017 Conference (Scottsdale, AZ Apr. 25, 2017).
191. “eDiscovery Without Rules: Responding to Government and Internal Investigations,” with Kevin Brady and David C. Shonka, The Sedona Conference® Legal Track at IPRO “Innovations” 2017 Conference (Scottsdale, AZ Apr. 25, 2017).
192. “Your Computer is Smarter and Faster Than You: Embracing Technology-Assisted Review and Artificial Intelligence in Your Litigation Practice,” with Brendan Miller and Curtis Collette, ABA Section of Litigation Annual Conference (San Francisco, CA May 4, 2017).
193. “#Social Media: What You Don’t Know Can Harm You,” with Mark A. Berman and Hon. Ronald J. Hedges, New York State Supreme Court Appellate Divisions Joint In-House Continuing Legal Education (“CLE”) Program (New York, NY May 9, 2017).
194. “A Candid Conversation with Former U.S. District Judge Shira A. Scheindlin,” Deloitte Tenth Annual Electronic Discovery Symposium for Government Agencies (Washington, DC May 11, 2017).
195. “Using Mediation to Effectively Resolve eDiscovery Disputes,” with Mike Hamilton, Hon. Ronald J. Hedges, and Hon. Frank Maas, Exterro Webinar (May 12, 2017).
196. “2017 eDiscovery Update: Trends and Developments Under the Federal Rules and Beyond,” with Hon. James C. Francis IV, Hon. Ronald J. Hedges, and Jeane A. Thomas, American Law Institute (“ALI”) Continuing Legal Education (“CLE”) Webcast (May 31, 2017).
197. “Practicum on eDiscovery Planning,” with Craig D. Ball, Hon. John M. Facciola, and Tom O’Connor, The Tenth Annual eDiscovery Training Academy, Georgetown University Law Center (Washington, DC June 4, 2017).
198. “Realizing Your Goals for the Academy,” with Craig D. Ball, Hon. John M. Facciola, and Tom O’Connor, The Tenth Annual eDiscovery Training Academy, Georgetown University Law Center (Washington, DC June 4, 2017).

199. “An Introduction to eDiscovery: What is ‘ESI,’ What Makes It So Different From Paper, and What Role Does eDiscovery Play in the Litigation Process?,” Topics in Electronic Discovery Course, Georgetown University Law Center Summer 2017 First-Week Upper-Class JD and LLM Course (Washington, DC June 5, 2017).
200. “The Law of Collections and Form of Production,” with Mark S. Sidoti, The Tenth Annual eDiscovery Training Academy, Georgetown University Law Center (Washington, DC June 6, 2017).
201. “How Do the Federal Rules of Civil Procedure Related to eDiscovery Work, and What is Federal Rule of Evidence 502?,” Topics in Electronic Discovery Course, Georgetown University Law Center Summer 2017 First-Week Upper-Class JD and LLM Course (Washington, DC June 6, 2017).
202. “Technology-Assisted Review and Enhanced Search,” The Tenth Annual eDiscovery Training Academy, Georgetown University Law Center (Washington, DC June 7, 2017).
203. “The Courts and Predictive Coding: Where They Are and Where They Are Going,” with Craig D. Ball, Hon. John M. Facciola, Tom O’Connor, and Mark S. Sidoti, The Tenth Annual eDiscovery Training Academy, Georgetown University Law Center (Washington, DC June 7, 2017).
204. “Fundamentals of Search and Review in eDiscovery and Developing a Sound and Defensible Search and Review Process,” Topics in Electronic Discovery Course, Georgetown University Law Center Summer 2017 First-Week Upper-Class JD and LLM Course (Washington, DC June 7, 2017).
205. “Federal Rule of Evidence 502,” with Hon. John M. Facciola and Mark S. Sidoti, The Tenth Annual eDiscovery Training Academy, Georgetown University Law Center (Washington, DC June 8, 2017).
206. “Privacy and Regulation of eDiscovery Process,” with Craig D. Ball, Hon. John M. Facciola, Tom O’Connor, and Mark S. Sidoti, The Tenth Annual eDiscovery Training Academy, Georgetown University Law Center (Washington, DC June 8, 2017).
207. “Ethics,” with Hon. John M. Facciola and Mark S. Sidoti, The Tenth Annual eDiscovery Training Academy, Georgetown University Law Center (Washington, DC June 8, 2017).
208. “Selected Ethical and Other Issues in eDiscovery: Attorney Competence, Cooperation, Social Media, Bring Your Own Device, and the Internet of Things – Part I,” Topics in Electronic Discovery,” Georgetown University Law Center Summer 2017 First-Week Upper-Class JD and LLM Course (Washington, DC June 8, 2017).
209. “Selected Ethical and Other Issues in eDiscovery: Attorney Competence, Cooperation, Social Media, Bring Your Own Device, and the Internet of Things – Part II,” Topics in Electronic Discovery,” Georgetown University Law Center Summer 2017 First-Week Upper-Class JD and LLM Course (Washington, DC June 9, 2017).
210. “Selective Digital Amnesia,” with Gordon V. Cormack, DESI VII Workshop on Using Advanced Data Analysis in eDiscovery and Related Disciplines to Identify and Protect Sensitive Information in Large Collections at the 16th International Conference on Artificial Intelligence and the Law (“ICAIL”) 2017 (London, UK June 12, 2017).
211. “Technology-Assisted Review: Fact or Fiction?,” with Tess Blair, Gordon V. Cormack, and Chris Dale, Morgan Lewis & Bockius LLP Continuing Legal Education (“CLE”) Program (London, UK June 13,

2017).

212. “Artificial Intelligence,” with Julie Daughtry, Gordon V. Cormack, Francis McGovern, Steven Robinson, and Hon. Lee Rosenthal, 2017 Judges’ Seminar, Duke Law Center for Judicial Studies (Durham, NC June 16, 2017).
213. “eDiscovery and Social Media Issues,” with Mark Berman and Hon. Ronald J. Hedges, Continuing Legal Education (“CLE”) Program for Court Attorneys and Principal Law Clerks of the New York State Appellate Division First Department (New York, NY June 27, 2017).
214. “Fundamentals of Electronic Search: From Keywords to Technology-Assisted Review,” with Gordon V. Cormack and Jamie A. Chuck, Hawaii State Bar Association (Honolulu, HI July 18, 2017).
215. “Protecting the Confidentiality of Client Communications and Records Both in Practice and in Litigation,” with Gordon V. Cormack and Jamie A. Chuck, Hawai‘i County Bar Association in Conjunction with the Hawaii State Bar Association (Hilo, HI July 20, 2017).
216. “Enhancing Your Value as a Paralegal in an Increasingly Data-Driven World,” with Gordon V. Cormack, Keynote Luncheon at Hawaii Paralegal Association Legal Expo (Honolulu, HI July 21, 2017).
217. “ESI Basics – Part I,” National Judicial Collect Course on Judging in the Digital Age: Conquering Discovery and Admission of ESI (Reno, NV Aug. 15, 2017).
218. “ESI Basics – Part II,” National Judicial Collect Course on Judging in the Digital Age: Conquering Discovery and Admission of ESI (Reno, NV Aug. 15, 2017).
219. “Search Today and Tomorrow – Part I,” National Judicial Collect Course on Judging in the Digital Age: Conquering Discovery and Admission of ESI (Reno, NV Aug. 15, 2017).
220. “Search Today and Tomorrow – Part II,” National Judicial Collect Course on Judging in the Digital Age: Conquering Discovery and Admission of ESI (Reno, NV Aug. 15, 2017).
221. “Moderated Questions, Answers, and Open Discussion,” with Hon. Daniel J. Crothers and Mark Lanterman, National Judicial Collect Course on Judging in the Digital Age: Conquering Discovery and Admission of ESI (Reno, NV Aug. 15, 2017).
222. “Hands On Discovery – Computer Lab on Search,” with Hon. Daniel J. Crothers, National Judicial Collect Course on Judging in the Digital Age: Conquering Discovery and Admission of ESI (Reno, NV Aug. 16, 2017).
223. “ESI Legal Issues: From Privacy to Possession, Custody, or Control,” with Hon. Daniel J. Crothers, National Judicial Collect Course on Judging in the Digital Age: Conquering Discovery and Admission of ESI (Reno, NV Aug. 16, 2017).
224. “Proportionality and Cost Shifting,” with Hon. Daniel J. Crothers, National Judicial Collect Course on Judging in the Digital Age: Conquering Discovery and Admission of ESI (Reno, NV Aug. 17, 2017).
225. “Spoliation and Sanctions,” with Hon. Daniel J. Crothers, National Judicial Collect Course on Judging in the Digital Age: Conquering Discovery and Admission of ESI (Reno, NV Aug. 17, 2017).

226. “Open Discussion and Conclusions,” with Hon. Daniel J. Crothers and Mark Lanterman, National Judicial Collect Course on Judging in the Digital Age: Conquering Discovery and Admission of ESI (Reno, NV Aug. 17, 2017).
227. “Straight Talk About TAR,” with Thomas C. Gricks III, Jeremy Pickens, and John Tredennick, Catalyst Webinar (Aug. 30, 2017).
228. “What is TAR?,” with Evan Benjamin, Bruce Hedin, George Socha, and Hon. William R. Wilson, Duke Bench-Bar Conference on TAR Best Practices (Arlington, VA Sept. 7-8, 2017).
229. “Taming the Over-Preservation Beast,” with Sarah Donovan, Jana Limer Mills, and Joe Morris, Zapproved 2017 Conference on Preservation Excellence (“PREX 2017”) (Portland, OR Sept. 13, 2017).
230. “Judicial Panel: Return of Case Law by the Clock,” with Hon. Ronald J. Hedges, Hon. Elizabeth Laporte, Hon. Frank Maas, Hon. Andrew J. Peck, and Hon. Xavier Rodriguez, Zapproved 2017 Conference on Preservation Excellence (“PREX 2017”) (Portland, OR Sept. 14, 2017).
231. “Rule 34 of the Federal Rules of Civil Procedure: eDiscovery Requests and Responses,” with Jeffrey Fowler and Ariana J. Tadler, Practicing Law Institute (“PLI”) Electronic Discovery Institute 2017: What Corporate and Outside Counsel Need to Know (New York, NY Sept. 18, 2017).
232. “Fundamentals of Technology-Assisted Review,” Guest Lecturer at Hon. Xavier Rodriguez’s Electronic Discovery Course at St. Mary’s University School of Law (San Antonio, TX Sept. 21, 2017).
233. “Industry / Faculty Panel,” with Alex Hudak, Sergey Gorbunov, Kate Larson, and Jeff Pound, 2017 David R. Cheriton School of Computer Science Undergraduate Research Opportunities Conference (“UROC 2017”) (Waterloo, ON Sept. 22, 2017).
234. “Straight Talk on TAR: Addressing Head On the Myths and Misinformation That are Holding TAR Back,” with Eric Schultenover, Ron Tienzo, and John Tredennick (Nashville, TN Oct. 3, 2017).
235. “Straight Talk on TAR: Addressing Head On the Myths and Misinformation That are Holding TAR Back,” with Michael Murphy, Ron Tienzo, and John Tredennick (Atlanta, GA Oct. 4, 2017).
236. “Fundamentals of Technology-Assisted Review and Continuous Active Learning,” with Gordon V. Cormack, at Stikeman Elliott LLP (Toronto, ON Oct. 11, 2017).
237. “The Future of E-Discovery Innovation in Canada,” with Hon. Colin L. Campbell and James Swanson, Ontario eDiscovery Institute 2017 Co-Sponsored by The Advocates’ Society, the Ontario Bar Association, and The Law Society of Upper Canada (Toronto, ON Oct. 16, 2017).
238. “How to Run a Successful Predictive Coding Project,” Advocates’ Society Ontario eDiscovery Institute 2017 Co-Sponsored by The Advocates’ Society, the Ontario Bar Association, and The Law Society of Upper Canada (Toronto, ON Oct. 16, 2017).
239. “Attorney Algorithm Aversion,” TED Talk at 2017 Fin (Legal) Tech Conference sponsored by The Law Lab at Illinois Tech – Chicago Kent College of Law (Chicago, IL Oct. 19, 2017).
240. “What Attorney Competence Means When It Comes to Handling Electronically Stored Information,” with Hon. Ronald J. Hedges, Shawndra G. Jones, and Hon. Roslyn H. Richter, Legal Ethics in the Digital

Age Fall 2017, New York State Bar Association Commercial and Federal Litigation Section Program (New York, NY Oct. 25, 2017).

- 241. “The Do’s and Don’ts of Attorney Social Media Use and Advice to Clients: An Overview of the ‘Rules of the Road,’” with Michael L. Fox, Daniel Lust, and Scott L. Malouf, Legal Ethics in the Digital Age Fall 2017, New York State Bar Association Commercial and Federal Litigation Section Program (New York, NY Oct. 25, 2017).
- 242. “Technology and Legal Education,” with Joshua Covey, Gerald Lewis, Jr., and Gary Merchant, Second Annual Legal Analytics & Big Data Workshop, Center for Law, Science & Innovation at Arizona State University “ASU”) Law School (Phoenix, AZ Oct. 27, 2017).
- 243. “TAR Trends Around the World,” with Chris Dale, Constantine Pappas, and Hon. Andrew J. Peck, Technology in Practice (“TiP”) 2017 National eDiscovery and Litigation Technology Conference (Toronto, ON Nov. 9, 2017).
- 244. “Where is TAR Headed in 2018 and Beyond?,” with Hon. Kristin L. Mix, Jeffrey M. Sharer, James A. Sherer, and Ronni D. Solomon, Georgetown Advanced eDiscovery Institute (Washington, DC Nov. 16, 2017).
- 245. “Law, Ethics, and Policy in an Automated World,” with Carol Eoannou, Keynote at Bloomberg Law’s Emerging Technologies and Legal Ethics Program (New York, NY Nov. 30, 2017).
- 246. “A Lawyer’s Ethical Duties with Emerging Technologies,” with Roy D. Simon, Harris Z. Tilovitz, and James Q. Walker, Panel at Bloomberg Law’s Emerging Technologies and Legal Ethics Program (New York, NY Nov. 30, 2017).
- 247. “Updating Your Toolkit: Experts Discuss,” with Craig Ball, Mike Hamilton, Ralph C. Losey, and George Socha, Exterro Third Annual eDiscovery Day Webcast (Dec. 1, 2017).
- 248. “The Rules on their Second Anniversary Including a Case Study on Sanctions,” with Kevin F. Brady, Hon. J. Michelle Childs, Hon. John M. Facciola, Hon. James C. Francis IV, Dawson Horn III, Hon. Andrew J. Peck, James A. Sherer, and Hon. Lisa Margaret Smith, Sandpiper Partners Fourth Annual Innovation in eDiscovery Conference (New York, NY Dec. 7, 2017).
- 249. “Technology, TAR, Machine Learning, and AI,” with Kevin F. Brady, Hon. J. Michelle Childs, Hon. John M. Facciola, Hon. James C. Francis IV, Dawson Horn III, David J. Kessler, Mollie C. Nichols, Hon. Andrew J. Peck, James A. Sherer, and Hon. Lisa Margaret Smith, Sandpiper Partners Fourth Annual Innovation in eDiscovery Conference (New York, NY Dec. 7, 2017).

2016 TALKS

- 250. “Requesting and Producing ESI,” with Hon. Ronald J. Hedges and Dean Emeritus Jim Rosenblatt, Guest Lecture at the Mississippi College School of Law Electronically Stored Information (E-Discovery) Course (Jackson, MS Jan. 12, 2016).
- 251. “Ethical Considerations,” with Hon. Ronald J. Hedges and Dean Emeritus Jim Rosenblatt, Guest Lecture at the Mississippi College School of Law Electronically Stored Information (E-Discovery) Course (Jackson, MS Jan. 12, 2016).

252. “Fundamentals of Electronic Discovery,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age Clinic Course at Columbia Law School (New York, NY Feb. 11, 2016).
253. “Technology-Assisted Review for eDiscovery,” Guest Lecture at William P. Butterfield and Allison Stanton’s eDiscovery Class at American University Washington College of Law (Washington, DC Feb. 16, 2016).
254. “Fundamentals of Electronic Discovery,” Guest Lecture at Karen Eltis’ Internet/Cyber Law Course at the University of Ottawa Faculty of Law (Mar. 1, 2015).
255. “Day 1 Keynote Address: The New Rules in Action,” with Lea Malani Bays, Kevin Brady, and Hon. Shira A. Scheindlin, 2016 Fifth Annual Arizona State University (“ASU”) – Arkfeld eDiscovery and Digital Evidence Conference (Tempe, AZ Mar. 9, 2016).
256. “TAR Wars: Debating the Sticking Points,” with Lea Malani Bays, Hon. Craig B. Shaffer, John Tredennick, and Martin Tully, 2016 Fifth Annual Arizona State University (“ASU”) – Arkfeld eDiscovery and Digital Evidence Conference (Tempe, AZ Mar. 10, 2016).
257. “Getting Specific: Formulating and Responding to Rule 34 Requests in the New Age,” with Lea Malani Bays, Robert Owen, Hon. Craig Shaffer, Ariana J. Tadler, and Kelly Warner, The Tenth Annual Sedona Conference Institute on eDiscovery – Staying Ahead of the eDiscovery Curve: Retooling Your Practice Under the New Federal Rules (Rancho Bernardo, CA Mar. 17, 2016).
258. “Using Technology to Achieve Proportionality,” with James Bekier, Tor Gronborg, Taylor Hoffman, and Cecil Lynn, The Tenth Annual Sedona Conference Institute (“TSCI”) Program on eDiscovery – Staying Ahead of the eDiscovery Curve: Retooling Your Practice Under the New Federal Rules (Rancho Bernardo, CA Mar. 17, 2016).
259. “Ethics of Litigation,” with Merri A. Baldwin, Hon. Ronald J. Hedges, and Hon. Frank Maas, American Law Institute Continuing Legal Education (“ALI CLE”) Webinar (May 10, 2016).
260. “Leveraging the Use of Technology-Assisted Review,” with Tracy Greer, Chris May, and Glen Melcher, Deloitte Electronic Discovery Symposium for Government Agencies (Washington, DC May 12, 2016).
261. “Leveraging Rule 53 – The Value of the Special Master,” with Hon. John M. Facciola, Hon. Richard A. Levie, Hon. Nan R. Nolan, Deloitte Ninth Annual Electronic Discovery Symposium for Government Agencies (Washington, DC May 12, 2016).
262. “Proportionate and Cost-Effective eDiscovery: An Oxymoron?,” with Ignatius A. Grande, Hon. Barbara Kapnick, Hon. Andrew J. Peck, Sandra J. Rampersaud, and Anne S. Rutland, New York State Bar Association (“NYSBA”) Commercial and Federal Litigation Section Spring Meeting (Cooperstown, NY May 13 – 15, 2016).
263. “A Discussion of the Stickiest Issues Involving TAR,” with Henry J. Kelston, Hon. Nan R. Nolan, Hon. Andrew J. Peck, and Martin Tully, 2016 American Bar Association (“ABA”) Tenth Annual National Institute on eDiscovery (Chicago, IL May 20, 2016).
264. “The Rise of the Machines,” with John Barkett, Wendy Wen Yun Chang, and Edward J. Walters, American Bar Association (“ABA”) 42nd National Conference on Professional Responsibility,”

(Philadelphia, PA June 2, 2016).

265. “Practicum on eDiscovery Planning,” with Craig Ball, Hon. John M. Facciola, and Tom O’Connor, Georgetown eDiscovery Training Academy (Washington, DC June 5, 2016).
266. “Law of Collections and Forms of Production,” with Mark S. Sidoti, Georgetown eDiscovery Training Academy (Washington, DC June 7, 2016).
267. “Technology-Assisted Review and Enhanced Search,” Georgetown eDiscovery Training Academy (Washington, DC June 8, 2016).
268. “The Courts and Predictive Coding: Where Are They and Where They Are Going,” with Craig Ball, Hon. John M. Facciola, Tom O’Connor, and Mark S. Sidoti, Georgetown eDiscovery Training Academy (Washington, DC June 8, 2016).
269. “Federal Rule of Evidence 502,” with Hon. John M. Facciola and Mark S. Sidoti, Georgetown eDiscovery Training Academy (Washington, DC June 9, 2016).
270. “Privacy Regulation of eDiscovery Process,” with Hon. John M. Facciola, Georgetown eDiscovery Training Academy (Washington, DC June 9, 2016).
271. “Mock Rule 26(f) and 16(b) Conferences,” with Hon. Paul W. Grimm, Georgetown eDiscovery Training Academy (Washington, DC, June 10, 2016).
272. “Comparative Judicial Ethics in the Digital Age: Lawyers, Judges, and Social Media – A U.S. Perspective” with Stephen Bindman, Karen Eltis, Hon. Frances Kiteley, and Hon. Yigal Mersel, International Legal Ethics Conference VII (“ILEC 2016”) (New York, NY July 14, 2015).
273. “Proportionality in Discovery: Change to Rule 26(b)(1) – Sea Change or Minor Tweak?,” with Andrea D’Ambra and Brian Corbin, Today’s General Counsel Institute: The Exchange eDiscovery (New York, NY July 18, 2016).
274. “Developments in Search,” with Andrea D’Ambra, Krista Fuller, David Grant, Chuck Kellner, and Lee McCallister, Today’s General Counsel Institute: The Exchange eDiscovery (New York, NY July 18, 2016).
275. “Litigation Technology: Meeting the Changing Landscape,” with Thomas C. Gricks III, Scott Reents, and Thomas Seymour, at Bloomberg Big Law Business Conference on Taking Control of Corporate Discovery: What It Means for Outside Counsel (New York, NY July 21, 2016).
276. “Legal Ethics and Artificial Intelligence: Is It Time to Regulate AI?,” with John Barkett, Wendy Wen Yun Chang, and Ed Walters, Bloomberg BNA Webinar (Aug. 25, 2016).
277. “Judge Scheindlin: Looking Back, Looking Ahead,” Keynote Address with Hon. Shira A. Scheindlin, 2016 Conference on Preservation Excellence (“PREX16”) (Portland, OR Sept. 14, 2016).
278. “Preservation and Privacy – Beyond Safe Harbor,” with Woods Abbott, Hon. Andrew J. Peck, and Jeane A. Thomas, 2016 Conference on Preservation Excellence (“PREX16”) (Portland, OR Sept. 15, 2016).

279. “Amendments to the Federal Rules of Civil Procedure and Their Impact on eDiscovery – The First Year,” with Thomas Y. Allman and Ariana J. Tadler, Practicing Law Institute’s (“PLI’s”) Electronic Discovery Institute 2016: What Corporate and Outside Counsel Need to Know (New York, NY Sept. 19, 2016).
280. “eDiscovery and Information Governance in Office 365,” with John P. Collins, DTI Global Lunch Seminar (New York, NY Sept. 20, 2016).
281. “Technology 2020 and Case Study on ‘Possession, Custody, and Control’: What ESI Does Your Client ‘Control’ in Today’s Digital World?,” with Kevin F. Brady, Hon. John M. Facciola, Jason L. Lichtman, Hon. Andrew J. Peck, and Paul Weiner, Sandpiper Partners Third Annual Innovation in E-Discovery Conference (New York, NY Sept. 28, 2016).
282. “Preservation, Production, and Sanctions Under the New Rules: Developing New Techniques Early in the Matter to Avoid Costly Missteps,” with Kevin F. Brady, Nicole Eichberger, Hon. James C. Francis, IV, Henry J. Kelston, David J. Lender, Hon. Frank Maas, Karin Scholz Jenson, and Kiriaki Tourikis, Sandpiper Partners Third Annual Innovation in E-Discovery Conference (New York, NY Sept. 28, 2016).
283. “Cross-Border Data Protection, Data Security, Privacy: Top of Agenda,” with Hon. Joseph A. Dickson, Nicole Eichberger, David J. Lender, Hon. Andrew J. Peck, David C. Shonka, and Kelli J. Stenstrom, Sandpiper Partners Third Annual Innovation in E-Discovery Conference (New York, NY Sept. 28, 2016).
284. “What Does Attorney Competence Mean When It Comes to Handling Electronic Discovery?,” with Anthony Harwood, Hon. Ronald J. Hedges, and Scott Reents, New York State Bar Association Program on Legal Ethics in the Digital Age (New York, NY Sept. 29, 2016).
285. “The Do’s and Don’ts of Attorney Social Media Use and Advice,” with Michael Fox, Ignatius Grande, and Scott Malouf, New York State Bar Association Program on Legal Ethics in the Digital Age (New York, NY Sept. 29, 2016).
286. “Fundamentals of Electronic Discovery,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Zulack’s Lawyering in the Digital Age Clinic Course at Columbia Law School (New York, NY Sept. 29, 2016).
287. “Mock Hearing on Technology-Assisted Review,” with Lea Malani Bayes and Hon. Andrew J. Peck, National eDiscovery Leadership Institute at the University of Missouri-Kansas City School of Law (Kansas City, MO Oct. 21, 2016).
288. “Search Syntax – Dispelling Myths About Keyword Search,” with Kathryn J. Manning and Crystal O’Donnell, Ontario Bar Association and Law Society of Upper Canada 2016 Ontario eDiscovery Institute (Toronto, ON Oct. 25, 2016).
289. “Machine Learning – When and How to Use It,” with Scott Hunter and Kathryn J. Manning, Ontario Bar Association and Law Society of Upper Canada 2016 Ontario Bar Association eDiscovery Institute (Toronto, ON Oct. 25, 2016).
290. “Fundamentals of Technology-Assisted Review and Federal Rule of Evidence 502,” Guest Lecture at Judge Thomas I. Vanaskie’s Electronic Evidence Course at Penn State Dickson Law School (Oct. 27, 2016).
291. “Competence and Supervision Issues Arising Out of Electronic Information,” with Hon. Ronald J. Hedges, Shawndra G. Jones, and Amy Walker Wagner, The Ethics of Electronic Information:

Competence, Confidentiality, and Other Ethical Conundrums, Practicing Law Institute (“PLI”) Continuing Legal Education (“CLE”) Program (New York, NY Nov. 2, 2016).

292. “Protecting Attorney-Client Privilege, Work Product, and Client Confidences When Working with Electronic Information,” with Hon. Ronald J. Hedges, Shawndra G. Jones, and Amy Walker Wagner, The Ethics of Electronic Information: Competence, Confidentiality, and Other Ethical Conundrums, Practicing Law Institute (“PLI”) Continuing Legal Education (“CLE”) Program (New York, NY Nov. 2, 2016).
293. “Ethical Implications of Social Media and Electronic Filing,” with Hon. Ronald J. Hedges, Shawndra G. Jones, and Amy Walker Wagner, The Ethics of Electronic Information: Competence, Confidentiality, and Other Ethical Conundrums, Practicing Law Institute (“PLI”) Continuing Legal Education (“CLE”) Program (New York, NY Nov. 2, 2016).
294. “TAR and Analytics Deep Dive for Lawyers,” Technology in Practice 2016 (Toronto, Canada Nov. 3, 2016).
295. “TAR 2.0 – The Art of Concurrent Workflows,” with Yvette Bula and Peter Sanford, Technology in Practice 2016 (Toronto, Canada Nov. 3, 2016).
296. “The Prodigal Son – How Law Firms are Regaining Control of Document Review,” with Jessica Lockett, Sean Lynch, and Daniel Nyman, Technology in Practice 2016 (Toronto, Canada Nov. 4, 2016).
297. “The Use of Advanced Analytics and Technology-Assisted Review in Government Investigations and Litigation,” with Patrick McCulloch and Glenn Melcher, Deloitte Government eDiscovery Think Tank (Rosslyn, VA Nov. 9, 2016).
298. “Technology-Assisted Review: Fact or Fiction?,” at the Washington DC Bar Association eDiscovery and Information Governance Committee Meeting (Washington, DC Nov. 9, 2016).
299. “An Overview of the Custodian Tracking System (CTS) and eDiscovery Playbook at ConocoPhillips,” with Sheldon M. Patterson, George R. Pawloski, Mirna Sirbegovic, and Michael S. Stinson, Presentation for the Legal Department at ConocoPhillips (Houston, TX Nov. 10, 2016).
300. “TREC 2016 Total Recall Track Overview,” National Institute of Standards and Technology (“NIST”) 2016 Text REtrieval Conference (“TREC”) (Gaithersburg, MD Nov. 16, 2016).
301. “Big Data and New Technology: Implications for the Ethical Practice of Law,” with Luis J. Diaz, David H. Schwartz, and Mark S. Sidoti, Gibbons Tenth Annual E-Discovery and Ethics Conference (Orange, NJ Nov. 18, 2016).
302. “Technology-Assisted Review: Fact or Fiction?,” Guest Lecture at Gordon V. Cormack’s Designing Functional Programs (Advanced Version) Course at the David R. Cheriton School of Computer Science at the University of Waterloo (Waterloo, ON Dec. 1, 2016).
303. “Rule 26(b)(1): How to Make a Persuasive Proportionality Argument,” with Hon. Joy Flowers Conti and Michael Hamilton, Exterro Webinar for eDiscovery Day 2016 (Dec. 1, 2016).
304. “Technology-Assisted Review: Fact or Fiction?,” Arizona State University (“ASU”) – Arkfeld Legal Analytics and Big Data Workshop (Phoenix, AZ Dec. 8, 2016).

- 305. “Fundamentals of Electronic Discovery,” U.S. DOJ Tax Division eDiscovery Training Program (Washington, DC Dec. 12, 2016).
- 306. “Fundamentals of Search,” U.S. DOJ Tax Division eDiscovery Training Program (Washington, DC Dec. 13, 2016).
- 307. “Technology-Assisted Review: Plain and Simple,” Deloitte Government Continuing Legal Education (“CLE”) Program (Rosslyn, VA Dec. 14, 2016).

2015 TALKS

- 308. “The Ethics of Social Media: What Attorneys May and May Not Do,” with Hon. Ronald J. Hedges, Federal Bar Association Webinar (Jan. 7, 2015).
- 309. “Ethical Considerations in E-Discovery,” with Hon Ronald J. Hedges, Guest Lecture at Hon. Ronald J. Hedges’ E-Discovery (Electronically Stored Information—ESI) Course at the Mississippi College School of Law (Jan. 13, 2015).
- 310. “Privilege and Work Product in E-Discovery,” with Hon. Ronald J. Hedges, Guest Lecture at Hon. Ronald J. Hedges’ E-Discovery (Electronically Stored Information—ESI) Course at the Mississippi College School of Law (Jan. 13, 2015).
- 311. “How Do I Bring Value to My Organization . . . and Continue to Elevate and Accelerate My Career?,” with Dera J. Nevin, 2015 Kick-Off of the Cowen Group Leadership Breakfast Roundtable Series (New York, NY Jan. 15, 2015).
- 312. “Preservation Case Law – Judges and Experts Evaluate the Top Five Opinions of 2014,” with Michael Arkfeld, William P. Butterfield, Hon. James C. Frances IV, Hon. Ronald J. Hedges, and Hon. Frank S. Maas,” Legal Hold Pro / Zapproved, Inc. Super Session at LegalTech New York 2015 (New York, NY Feb. 3, 2015).
- 313. “Taking TAR to the Next Level: Recent Research and the Promise of Continuous Active Learning,” with Gordon V. Cormack, Susan Nielsen Hammond, Hon. Andrew J. Peck, and John Tredennick, Catalyst Repository Systems Plenary Session at LegalTech New York 2015 (New York, NY Feb. 3, 2015).
- 314. “In Search of the Right Search: Keywords, Manual Review, or Technology-Assisted Review (a.k.a. Predictive Coding)?,” Guest Lecture at William P. Butterfield and Allison Stanton’s eDiscovery Course at American Law School (Washington, DC Feb. 10, 2015).
- 315. “A User’s Guide to Technology-Assisted Review Using The Sauce,” with Gordon V. Cormack, Wachtell, Lipton, Rosen & Katz Continuing Legal Education (“CLE”) Program (New York, NY Feb. 11, 2015).
- 316. “A Paralegal’s Guide to Technology-Assisted Review Using The Sauce,” with Gordon V. Cormack, Wachtell, Lipton, Rosen & Katz Training Program (New York, NY Feb. 12, 2015).
- 317. “E-Discovery: Sanctions and Spoliation – What a Judge Needs to Know,” with Hon. Daniel Crothers and Hon. Thomas Zonay, National Judicial College / Institute for the Advancement of the American Legal System Webcast (Feb. 18, 2015).

318. “Technology-Assisted Review, Especially Predictive Coding,” Guest Interview for Michael Carbone and Allison Walton’s eDiscovery Skills Course at the UC Hastings College of the Law (Feb. 24, 2015).
319. “ESI and White Collar Cases: Compliance Strategies, Corporate Governance, and Ethics,” with Hon. James C. Frances IV, Hon. Ronald J. Hedges, Howard Bruce Klein, and Justin P. Murphy, American Law Institute Continuing Legal Education (“ALI CLE”) Live Videocast Program” (Philadelphia, PA Feb. 26, 2015).
320. “Fundamentals of Electronic Discovery,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age Clinic Course at Columbia Law School (New York, NY March 5, 2015).
321. “Keynote Address: Welcome to Tomorrow,” with Hon. Shira A Scheindlin and Joy Allen Woller, Fourth Annual Arizona State University (“ASU”) – Arkfeld eDiscovery and Digital Evidence Conference: Know the Law, Know the Technology (Tempe, AZ March 11, 2015).
322. “I Feel the Need, the Need for Speed (TAR),” with Hon. John M. Facciola, Scott A. Kane, Ariana J. Tadler, and John Tredennick, Fourth Annual Arizona State University (“ASU”) – Arkfeld eDiscovery and Digital Evidence Conference: Know the Law, Know the Technology (Tempe, AZ March 11, 2015).
323. “Technology-Assisted Review (TAR) for (Almost) Any Case,” with Thomas C. Gricks, III and Jeane Thomas, The Ninth Annual The Sedona Conference Institute (“TSCI”) Program on eDiscovery: Staying Ahead of the eDiscovery Curve and Keeping Pace With the New Rules (Nashville, TN March 19, 2015).
324. “The 2015 eDiscovery Judicial Roundtable,” with Hon. Joe B. Brown, Hon. William C. Koch, Hon. Kristin L. Mix, and Hon. Andrew J. Peck, The Ninth Annual The Sedona Conference Institute (“TSCI”) Program on eDiscovery: Staying Ahead of the eDiscovery Curve and Keeping Pace With the New Rules (Nashville, TN March 20, 2015).
325. “Scope and Limits of Government Investigations of Data Breaches,” with Christopher Cole, Samantha Green, Deborah Morris, and Allison Stanton, Government Investigations 2015: Electronic Information in Investigation and Response, Practicing Law Institute (“PLI”) (New York, NY March 23, 2015).
326. “Responding to Government Investigations and Handling Parallel Proceedings,” with Celeste Chase, John Einstman, Manfred J. Gabriel, Anthony Galoto, Ignatius A. Grande, Tracy Greer, Joseph P. Guglielmo, and Jeane A. Thomas, Government Investigations 2015: Electronic Information in Investigation and Response, Practicing Law Institute (“PLI”) (New York, NY March 23, 2015).
327. “Breaking Bad in the Digital Age: Ethics and Social Media,” Wachtell, Lipton, Rosen & Katz Continuing Legal Education (“CLE”) Program for Attorneys (New York, NY Apr. 8, 2015).
328. “Fundamentals of Technology-Assisted Review Using Predictive Coding,” Clear Law Institute Continuing Legal Education (“CLE”) Webinar (Apr. 14, 2015).
329. “Breaking Bad in the Digital Age: Ethics and Social Media,” Wachtell, Lipton, Rosen & Katz Continuing Legal Education (“CLE”) Program for Paralegals (New York, NY Apr. 22, 2015).

- 330. “Judicial Roundtable on eDiscovery,” with Hon. Hildy Bowbeer, Hon. Terrence P. Kemp, Hon. Andrew J. Peck, Hon. Irma C. Ramirez, Hon. Lee Rosenthal, and Hon. Craig Shaffer, The Sedona Conference Working Group 1 Mid-Year Meeting (Dallas, TX April 30, 2015).
- 331. “The 2015 Judicial Roundtable: A Judicial Perspective on eDiscovery,” with Hon. John M. Facciola, Hon. Paul S. Grewal, and Hon. Frank S. Maas, Deloitte Government Symposium (Washington, DC May 21, 2015).
- 332. “‘Meet and Confer’ Demonstrations,” with Craig D. Ball, Hon. John M. Facciola, and Thomas O’Connor, Georgetown eDiscovery Training Academy (Washington, DC May 31, 2015).
- 333. “Technology-Assisted Review and Enhanced Search,” Georgetown eDiscovery Training Academy (Washington, DC June 2, 2015).
- 334. “The Collections Process,” with Mark S. Sidoti, Georgetown eDiscovery Training Academy (Washington, DC June 3, 2015).
- 335. “Mock 26(f) Conferences,” with Hon. Nan R. Nolan, Georgetown eDiscovery Training Academy (Washington, DC June 5, 2015).
- 336. “Ethics and Social Media: What Every Attorney Should Know,” Clear Law Institute Continuing Legal Education (“CLE”) Webinar (June 11, 2015).
- 337. “Ethics and Social Media: What Attorneys Need to Know,” Bloomberg BNA Webinar (July 9, 2015).
- 338. “Taking TAR to the Next Level: Recent Research and the Promise of Continuous Active Learning,” with Gordon V. Cormack, Erin E. Harrison, Emi Ohira, and John Tredennick, Catalyst Repository Systems Plenary Session at Legaltech West Coast 2015 (San Francisco, CA July 13, 2015).
- 339. “Introduction to the Third Edition of Electronic Discovery and Digital Evidence,” with Daniel Capra, Hon. Shira A. Scheindlin, and Kenneth J. Withers, Sedona Conference Webinar (July 14, 2015).
- 340. “Machine-Learning Protocols for Technology-Assisted Review in eDiscovery,” at Google with Gordon V. Cormack (July 15, 2015).
- 341. “The Practical Implications of the Proposed Federal Rules of Civil Procedure (“FRCP”) Amendments (Effective December 1, 2015),” with Robert D. Brownstone, Wendy Butler Curtis, Scott Kessler, and Gina Trimarco, Today’s General Counsel and Institute “The Exchange” eDiscovery for the Corporate Market Program (New York, NY July 20, 2015).
- 342. “E-Discovery in Investigations: A Different Context,” with Taylor Hoffman, Farrah Pepper, James A. Sherer, Robert E. Singleton, and Amie Taal, Today’s General Counsel and Institute “The Exchange” eDiscovery for the Corporate Market Program (New York, NY July 20, 2015).
- 343. “Developments in Search,” with David Grant, Andre Guilbeau, Chuck Kellner, Thomas O’Connor, and Robert E. Singleton, Today’s General Counsel and Institute “The Exchange” eDiscovery for the Corporate Market Program (New York, NY July 20, 2015).
- 344. “Data Review Process,” Practising Law Institute (“PLI”) Nuts and Bolts of Electronic Discovery 2015 Program (New York and Live Webcast Sept. 1, 2015).

- 345. “Technology-Assisted Review: Where Are We and Where Are We Going?,” with Gilbert S. Keteltas, Practising Law Institute (“PLI”) Electronic Discovery Institute 2015: What Corporate and Outside Counsel Need to Know (New York, NY Sept. 2, 2015).
- 346. “Fundamentals of Technology-Assisted Review,” Guest Lecture at Judge Thomas I. Vanaskie’s Electronic Evidence Class at Penn State Law and Penn State – Dickson Law Schools (Carlisle, PA Sept. 24, 2015).
- 347. “Successful Discovery Strategies,” with Brian Chebli, Erica Devila, Dera J. Nevin, and Denise Scofield, at JPMorgan Chase Law Firm Discovery Liaison Training Day (New York, NY Sept. 28, 2015).
- 348. “Fundamentals of Electronic Discovery for New Associates,” with Claudia T. Morgan and Luis A. McNish, Wachtell, Lipton, Rosen & Katz New Associate Training Program (New York, NY Sept. 29, 2015).
- 349. “Trending Now: #Ethics, #Social Media, #eDiscovery, #Competence, and #Cloud Computing,” Deloitte Government Continuing Legal Education (“CLE”) Program (Arlington, VA Oct. 14, 2015).
- 350. “2015 Amendments to the Federal Rules of Civil Procedure: Judicial Discussion of eDiscovery Implications,” with Hon. Sheila Finnegan, Hon. Nan R. Nolan, Hon. Craig B. Shaffer, and Hon. Amy J. St. Eve, Seventh Circuit Pilot Project Webinar (Chicago, IL Oct. 14, 2015).
- 351. “Fundamentals of Electronic Discovery,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age Clinic Course at Columbia Law School (New York, NY Oct. 15, 2015).
- 352. “Technology-Assisted Review in eDiscovery,” with Philip J. Favro and Ariana J. Tadler, at Benjamin N. Cardozo Data Law Initiative (“CDLI”) Lunch Speakers Series (New York, NY Oct. 19, 2015).
- 353. “Fundamentals of Electronic Discovery for New Associates,” with Claudia T. Morgan and Luis A. McNish, Wachtell, Lipton, Rosen & Katz New Associate Training Program I (New York, NY Oct. 20, 2015).
- 354. “Technology-Assisted Review for Electronic Discovery,” Guest Speaker at Kathryn Hume’s Legal Practice – Legal Technology Course at the University of Calgary Faculty of Law (Oct. 26, 2015).
- 355. “Is Electronic Discovery Dead?,” Keynote Address at the Ontario Bar Association 2015 eDiscovery Institute (Toronto, Canada Oct. 29, 2015).
- 356. “Inverting the Pyramid: Non-Linear Approaches to Document Review as the New Standard,” with Yvette Bula, Marlon Hylton, and Crystal O’Donnell, Commonwealth Legal / A Division of Ricoh Canada Inc. Technology in Practice 2015 Conference (Toronto, Canada Nov. 5, 2015).
- 357. “The Ethical Implications of Electronically Stored Information,” with Hon. Ronald J. Hedges and Amy Walker Wagner, American Law Institute Continuing Legal Education (“ALI CLE”) Program (Philadelphia, PA Nov. 10, 2015).
- 358. “TREC 2015 Total Recall Track Overview Talk,” with Adam Roegiest (Gaithersburg, MD Nov. 18, 2015).

359. “Getting Stuck in TAR: Arguing the Big Issues Surrounding Predictive Coding,” with David Cohen, Thomas C. Gricks, III, Chuck Kellner, and Hon. Andrew J. Peck, The Twelfth Georgetown University Law Center Advanced eDiscovery Institute (Washington, DC Nov. 19, 2015).
360. “TREC 2015 Total Recall Plenary Session,” with Gordon V. Cormack, Ralph C. Losey, Mihai Lupu, Jeremy Pickens, and Hoatian Zhang (Gaithersburg, MD Nov. 20, 2015).
361. “A Change for the Better?: The 2015 Amendments to the Federal Rules of Civil Procedure Part I (Rules 26(d)(2), 34(b)(2)(B), 34(b)(2)(C), and 37(e)),” with Michael Arkfeld, Hon. James C. Francis IV, and Hon. Shira A Scheindlin, LexisNexis University On- Demand Continuing Legal Education (“CLE”) Program (New York, NY Nov. 24, 2015).
362. “A Change for the Better?: The 2015 Amendments to the Federal Rules of Civil Procedure Part II (Rules 1, 4(m), 16(b), 26(b)(1), 26(c)(1), and 26(f)),” with Michael Arkfeld, Hon. James C. Francis IV, and Hon. Shira A Scheindlin, LexisNexis University On- Demand Continuing Legal Education (“CLE”) Program (New York, NY Nov. 24, 2015).
363. “Legal Hold Orders: What’s New and What’s Not,” for the Litigation Services Group at ConocoPhillips (Houston, TX Dec. 1, 2015).
364. “Applying Your Computer Science Skills to Real World Applications,” Guest Lecture at two sections of Gordon V. Cormack’s Elementary Algorithm Design and Data Abstraction Course at the David R. Cheriton School of Computer Science, University of Waterloo (Waterloo, ON Dec. 3, 2015).
365. “2015 eDiscovery Update: Trends and Developments Under the FRCP and Beyond,” with Hon. James C. Francis IV, Hon. Ronald J. Hedges, and Jeane A. Thomas, American Law Institute Continuing Legal Education (“ALI CLE”) Webinar (Dec. 8, 2015).
366. “How Will New Rule 26(b)(1) and Proportionality Impact Search and the Use of Search Terms?,” with Hon. Joy Flowers Conti, Karin Scholz Jensen, David J. Kessler, Hon. Andrew J. Peck, and Kiriaki Tourikis, Sandpiper Partners Second Annual Conference on Innovation in eDiscovery (New York, NY Dec. 9, 2015).
367. “An Overview of the 2015 Amendments to the Federal Rules of Civil Procedure,” Continuing Legal Education (“CLE”) Program for the Legal Discovery Management and Litigation Groups at JPMorgan Chase & Co. (New York, NY Dec. 22, 2015).

2014 TALKS

368. “TAR Best Practices: Tools, Techniques, and Validation Methods,” with Gordon V. Cormack, Deloitte Discovery Continuing Legal Education (“CLE”) Program for Government Attorneys (Washington, DC Jan. 15, 2014).
369. “Doing It Right: Combining Technology and Cooperation in eDiscovery,” with Conor R. Crowley, David S. Leone, Ronni Solomon, and Ariana J. Tadler, Daegis Educational Session: eDiscovery Track at LegalTech New York 2014 (New York, NY Feb. 4, 2014).
370. “The Evolution, Uses, and Case Studies of Technology-Assisted Review,” with Eric Crespolini, Anthony Diana, and Hon. David J. Waxse, HP Autonomy Educational Session: Information Governance Track at LegalTech New York 2014 (New York, NY Feb. 4, 2014).

371. “Fundamentals of Electronic Discovery,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age Clinic Course at Columbia Law School (New York, NY Feb. 20, 2014).
372. “A.I. (‘Artificial Intelligence’) Enhanced Review,” with Hon. Joy Conti, Jon Lavinder, Johnny G. Lee, Ralph C. Losey, and Hon. David J. Waxse, eDiscovery Intelligence’s eDiscovery Project Management 2014 (Atlanta, GA Feb. 27, 2014).
373. “eDiscovery in Government and Regulatory Investigations,” with Elizabeth J. Campbell and Ronni Solomon, eDiscovery Intelligence’s eDiscovery Project Management 2014 (Atlanta, GA Feb. 27, 2014).
374. “Judicial Roundtable,” with Hon. Ralph Artigliere, Hon. John Carroll, Hon. Joy Conti, and Hon David J. Waxse, eDiscovery Intelligence’s eDiscovery Project Management 2014 (Atlanta, GA Feb. 27, 2014).
375. “eDiscovery From the Perspective of the Client, Plaintiff’s Counsel, and the Bench,” with Wayne C. Matus, Hon. Nan R. Nolan, and Ariana J. Tadler, Wachtell Lipton Rosen & Katz Continuing Legal Education (“CLE”) Program (New York, NY Mar. 5, 2014).
376. “Keynote Address on the Hottest Topics in eDiscovery” with Hon. Shira A. Scheindlin, at the Third Annual eDiscovery and Digital Evidence Conference: Essential Skills and Cutting-Edge Strategies, Sponsored by the Center for Law, Science & Innovation at the Sandra Day O’Connor College of Law in Collaboration with Michael Arkfeld (Tempe AZ Mar. 12, 2014).
377. “Technology-Assisted Review,” with Jason R. Baron, Jerone J. English, Hon. Andrew J. Peck, Paul E. Burns and Eric J. Schwartz, The 8th Annual Sedona Conference Institute eDiscovery (“TSCI”) Program (Houston, TX Mar. 13, 2014).
378. “Managing the eDiscovery Process / Making the Business Case for eDiscovery,” with Gavin Manes, Robert D. Owen, Hon. Andrew J. Peck, and Kenneth Prine, The 8th Annual Sedona Conference Institute (“TSCI”) Program (Houston, TX Mar. 13, 2014).
379. “Fundamentals of Technology-Assisted Review I,” for the New Mexico Chapter of the Federal Bar Association (Albuquerque, NM Mar. 19, 2014).
380. “Fundamentals of Technology-Assisted Review II,” for the New Mexico Chapter of the Federal Bar Association (Albuquerque, NM Mar. 19, 2014).
381. “Responding to a Government Investigation,” with Manfred J. Gabriel, Peter C. Harvey, Jeane A. Thomas, and Michelangelo Troisi, Practicing Law Institute (“PLI”) Program on Government Investigations 2014: The Role of Electronic Information in Investigation and Response (New York, NY Mar. 24, 2014).
382. “The Sedona Conference Webinar on the Latest Commentaries on Search of ESI and Achieving Quality in the eDiscovery Process,” with Jason R. Baron, Hon. James C. Francis IV, and Jeffrey C. Sharer, The Sedona Conference Voices From the Dessert Webinar Series (Mar. 27, 2014).
383. “Technology Flashpoints: TAR, Data Protection, and Dispute Resolution,” with Linda Clark, John M. Barkett, and Al Saikali, 16th Annual American Bar Association (“ABA”) Section of Dispute Resolution 2014 Spring Conference (Miami, FL Apr. 3, 2014).

- 384. “Introduction to International Electronic Discovery, Data Privacy, and Cross-Border Transfers: From Aerospatiale to Now,” with Hon. Elizabeth D. Laporte, Hon. Richard A. Kramer, David Shonka, and Kenneth J. Withers, The Sedona Conference Institute (“TSCI”) Program on Cross-Border Discovery and Data Protection Laws (San Francisco, CA Apr. 9, 2014).
- 385. “Predictive Coding on Trial,” with Paul E. Burns, Jerone J. English, and Hon. Craig Shaffer, American Bar Association (“ABA”) Section on Litigation Continuing Legal Education (“CLE”) Program (Scottsdale, AZ Apr. 10, 2014).
- 386. “Technology-Assisted Review at Wachtell, Lipton, Rosen & Katz,” with Gordon V. Cormack, Training Program for the Automated Litigation Support (“ALS”) Department at Wachtell, Lipton, Rosen & Katz (Apr. 24, 2014).
- 387. “Technology-Assisted Review (a.k.a. Predictive Coding) and Other E-Discovery Search Issues,” with Hon. Andrew J. Peck, Federal Judicial Center (“FJC”) National Workshop for Magistrate Judges I (San Antonio, TX May 1, 2014).
- 388. “Defending the eDiscovery Process: Burdens, Standards, and Best Practices,” with Sandra Rampersaud, Scott Reents, Brendan M. Schulman, and Hon. Craig B. Shaffer The Sedona Conference Working Group 1 Mid-Year Meeting (Miami, FL May 8-9, 2014).
- 389. “In Search of the Right Search: Keywords, Manual Review, or Technology-Assisted Review,” with Hon. Sheila Finnegan, Niloy Ray, and Hon. Geraldine Soat Brown, Seventh Circuit Bar Association 63rd Annual Meeting and Conference (Chicago, IL May 12, 2014).
- 390. “A Conversation with Judges Allegra, Anderson, Facciola and Maas on the Hottest Topics in eDiscovery,” with Hon. Francis M. Allegra, Hon. John F. Anderson, Hon. John M. Facciola, and Hon. Frank Maas, Deloitte Electronic Discovery Symposium for Government Agencies: Innovation and eDiscovery (Washington, DC May 15, 2014).
- 391. “Something Just Isn’t Right Here: Challenging and Defending the eDiscovery Process,” with Jason R. Baron, Conor R. Crowley, and Hon. Andrew J. Peck, Eighth Annual American Bar Association (“ABA”) National Institute on e Discovery (New York, NY May 16, 2014).
- 392. “‘Meet and Confer’ Demonstrations,” with Craig Ball, Hon. John M. Facciola, and Tom O’Connor, 2014 Georgetown eDiscovery Training Academy (Washington, DC June 1, 2014).
- 393. “Realizing Your Goals for the Academy,” with Craig Ball, Hon. John M. Facciola, and Tom O’Connor, 2014 Georgetown eDiscovery Training Academy (Washington, DC June 1, 2014).
- 394. “Technology-Assisted Review and Enhanced Search,” 2014 Georgetown eDiscovery Training Academy (Washington, DC June 3, 2014).
- 395. “The Courts and Predictive Coding: Where They Are and Where They Are Going,” with Craig Ball, Hon. John M. Facciola, and Mark S. Sidoti, 2014 Georgetown eDiscovery Training Academy (Washington, DC June 3, 2014).
- 396. “The Collections Process,” with Mark S. Sidoti, 2014 Georgetown eDiscovery Training Academy (Washington, DC June 4, 2014).

- 397. “Ethics,” with Craig Ball, Hon. John M. Facciola and Mark S. Sidoti, 2014 Georgetown eDiscovery Training Academy (Washington, DC June 4, 2014).
- 398. “Anticipating the Future, with Craig Ball, Hon. John M. Facciola, and Mark S. Sidoti, 2014 Georgetown eDiscovery Training Academy (Washington, DC June 4, 2014).
- 399. “Privacy,” with Craig Ball, John M. Facciola, Tom O’Connor, and Mark S. Sidoti, 2014 Georgetown eDiscovery Training Academy (Washington, DC June 5, 2014).
- 400. “Fundamentals of E-Discovery for State Court Judges,” with Hon. Daniel Crothers and Hon. Thomas Zonay, National Judicial College / Institute for the Advancement of the American Legal System Webcast (June 11, 2014).
- 401. “Technology and Litigation: What Is Really Happening in E-Discovery and What Will the Future Look Like,” with Dean David F. Levi, Francis McGovern, Hon. Lee Rosenthal, Ian Wilson, and Jun Yang, Master of Judicial Studies Program Judges’ Seminar, Duke University School of Law Center for Judicial Studies (Durham, NC June 13, 2014).
- 402. “Predictive Coding: Trends and Challenges,” with Jay Leib, Martha Louks, Constantine Pappas, Karl Schieneman, and Geoffrey A. Vance, McDermott Will & Emery 2014 Technology in the Law Symposium – Big Data: Transforming Costly Chaos into Valuable Intelligence (Chicago, IL June 19, 2014).
- 403. “Evaluation of Machine-Learning Protocols for Technology-Assisted Review in Electronic Discovery,” with Gordon V. Cormack, SIGIR ’14 (Gold Coast, Queensland, Australia July 8, 2014).
- 404. “Technology-Assisted Review (a.k.a. Predictive Coding) and Other E-Discovery Search Issues,” with Hon. Andrew J. Peck, Federal Judicial Center (“FJC”) National Workshop for Magistrate Judges II (Philadelphia, PA July 24, 2014).
- 405. “Building an Enlightened Legal Hold Plan,” with Craig Ball, David Cohen, Hon. Frank Maas, and Dawn Radcliffe, Third Annual Conference on Preservation Excellence (“PREX-14”), Sponsored by LegalHold Pro (Portland, OR Sept. 10, 2014).
- 406. “Addressing the Cost of Preservation,” with Craig Ball, Brad Ellis, Tony Knappen, and Charlotte Riser-Harris, Third Annual Conference on Preservation Excellence (“PREX-14”), Sponsored by LegalHold Pro (Portland, OR Sept. 10, 2014).
- 407. “Legal Holds Without Borders,” with Hon. Paul Grewal, Dawn Radcliffe, and Jeane Thomas, Third Annual Conference on Preservation Excellence (“PREX-14”), Sponsored by LegalHold Pro (Portland, OR Sept. 10, 2014).
- 408. “Search and Review” with Heather Caputo, Jerone J. English, Hon. James C. Francis IV, Kathryn (Kit) Goetz, Daniel Kulakofsky, Hon. Nan R. Nolan, Hon. Andrew J. Peck, and Hon. Craig B. Shaffer Electronic Discovery Institute Distance Learning Program (New York, NY Sept. 16, 2014).
- 409. “Fundamentals of Electronic Discovery for New Associates,” with Claudia T. Morgan and Luis A. McNish, Wachtell, Lipton Rosen & Katz New Associate Training Program I (New York, NY Sept. 16, 2014).

410. “Technology-Assisted Review: Opportunities and Challenges,” New York eDiscovery Counsel Round Table (New York, NY Sept. 18, 2014). [12:30 – 2:00 PM]
411. “E-Discovery: An Interactive Discussion of Advanced Search Technologies Including Technology-Assisted Review,” Institute on Complex Commercial Litigation at the Benjamin N. Cardozo School of Law at Yeshiva University (New York, NY Sept. 22, 2014).
412. “Technology-Assisted Review: Where We Are and Where Are We Going?,” with Gilbert S. Keteltas and Brian C. Rocca, Practising Law Institute (“PLI”) Electronic Discovery Institute 2014: What Corporate and Outside Counsel Need to Know (New York, NY Sept. 30, 2104).
413. “Fundamentals of Electronic Discovery,” Guest Lecturer at Karen Eltis’ Internet Law Course at the University of Ottawa Faculty of Law (October 6, 2014).
414. “Fundamentals of Electronic Discovery,” Guest Lecture at Brian Donnelly’s, Conrad A. Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age Clinic Course at Columbia Law School (New York, NY Oct. 9, 2014).
415. “Technology-Assisted Review (“TAR”) Boot Camp,” with Gordon V. Cormack, Deloitte Discovery Program for Government Lawyers (Washington, DC Oct. 15, 2014).
416. “Predictive Coding: Trends and Challenges,” with Jay Leib, Martha Louks, Constantine Pappas, Karl Schieneman, and Geoffrey A. Vance, McDermott Will & Emery 2014 Technology in the Law Symposium – Big Data: Transforming Costly Chaos into Valuable Intelligence (Washington, DC Oct. 16, 2014).
417. “Fundamentals of Electronic Discovery for New Associates,” with Luis A. McNish, Wachtell, Lipton Rosen & Katz New Associate Training Program II (New York, NY Oct. 23, 2014).
418. “Beyond the Basics: Getting Started with Technology-Assisted Review,” with Craig Ball, Gordon V. Cormack, Hon. Craig B. Shaffer, and Ariana J. Tadler, American Law Institute Continuing Legal Education “ALI CLE”) Webinar (Oct. 24, 2014).
419. “Disputes Involving Technology-Assisted Review (‘TAR’) or Predictive Coding,” with David Deppe, Gene Eames, Thomas C. Gricks, III, and Hon. Andrew J. Peck, Sandpiper Partners Innovation in eDiscovery Conference (New York, NY Oct. 29, 2014).
420. “The Judicial Roundtable,” with Hon. John M. Facciola, Hon. James L. Gale, Hon. Frank Maas, Hon. Kristin L. Mix, Hon. Andrew Peck, Hon. Xavier Rodriguez, and Hon. Karla Spaulding, The Sedona Conference “All Voices” and Working Group 1 Annual Meeting (New Orleans, LA Nov. 6, 2014).
421. “Approaches to Validating TAR Efforts,” with Gordon V. Cormack, Bruce Hedin, and David D. Lewis, The Sedona Conference “All Voices” and Working Group 1 Annual Meeting (New Orleans, LA Nov. 6, 2014).
422. “A Tour of TAR: Technologies, Workflows, and Case Law,” with Annika K. Martin, Hon. Andrew J. Peck, and Carmen M. Rodriguez, The Sedona Conference “All Voices” and Working Group 1 Annual Meeting (New Orleans, LA Nov. 7, 2014).
423. “The Judicial Roundtable,” with Hon. Joy Conti, Hon. Herbert L. Dixon, Hon. John M. Facciola, Hon. James C. Francis IV, Hon. Paul Grewal, Hon. Frank Maas, Hon. Kristin L. Mix, Hon. Andrew J. Peck,

Hon. Xavier Rodriguez, Hon. Craig B. Shaffer, and Hon. David J. Waxse, The 11th Annual Georgetown Advanced eDiscovery Institute (Tyson's Corner, VA Nov. 20-21, 2014).

- 424. "eDiscovery: Update on Trends and Developments Under the FRCP and Beyond" with Hon. James C. Francis IV, Hon. Ronald J. Hedges, Jeane A. Thomas, American Law Institute Continuing Legal Education ("ALI CLE") Live Videocast Program (Philadelphia, PA Dec. 2, 2014).
- 425. "In Search of the Right Search: Keywords, Manual Review, or Technology-Assisted Review (a.k.a. Predictive Coding)?," Guest Lecturer at Craig Ball's Electronic Discovery and Digital Evidence Course at the School of Law of the University of Texas at Austin (Dec. 3, 2014).

2013 TALKS

- 426. "2012 eDiscovery Wrap-Up: What Happened in 2012 and What Do We Expect in 2013?," with Hon. Ronald J. Hedges and Jeane A. Thomas, Bloomberg BNA Webinar (Jan 15, 2013).
- 427. "Can a Computer Do It Better, Faster, and Cheaper—A Discussion of Technology-Assisted Review," with Shannon Capone Kirk, Thomas C. Gricks III, Richard Marcus, and Hon. Andrew J. Peck, at the American Bar Association's ("ABA's") eDiscovery and Digital Evidence ("EDDE") 2013 eDiscovery and Information Governance National Institute at the Stetson University College of Law (Tampa FL Jan. 24, 2013).
- 428. "The Computer Says These Are All the Documents That Are Relevant—A Mock Hearing on Technology-Assisted Discovery Production," with Hon. John M. Facciola, Thomas C. Gricks III, Hon. Paul W. Grimm, and Hon. Shira A. Scheindlin, at the American Bar Association's ("ABA's") eDiscovery and Digital Evidence ("EDDE") 2013 eDiscovery and Information Governance National Institute at the Stetson University College of Law (Tampa FL Jan. 24, 2013).
- 429. "E-Discovery and Ethics," with John M. Barkett, Hon. Shira A. Scheindlin, and Ethan Wall, at the American Bar Association's ("ABA's") eDiscovery and Digital Evidence ("EDDE") 2013 eDiscovery and Information Governance National Institute at the Stetson University College of Law (Tampa FL Jan. 25, 2013).
- 430. "Statistical Sampling to Enhance and Defend Your E-Discovery Practice," with Pallab Chakraborty, Gordon V. Cormack, Maureen O'Neill, and James K. Wagner Jr., SuperSession Panel at LegalTech 2013 New York (New York, NY Jan. 29, 2013).
- 431. "How Good is Your Predictive Coding Poker Face?," with Craig Ball, Ralph Losey, and Matthew Nelson, SuperSession Panel at LegalTech 2013 New York (New York, NY Jan. 29, 2013).
- 432. "Meaning Based eDiscovery: Case Studies and Lessons Learned from the Use of Predictive Coding and Advanced Analytics," with Thomas Lidbury, Jennifer Keadle Mason, George Tziahanas, and Alan Winchester, Plenary Session at LegalTech 2013 New York (New York, NY Jan. 30, 2013).
- 433. "The Grossman-Cormack Glossary of Technology-Assisted Review, with Foreword by John M. Facciola, U.S. Magistrate Judge," ESIBytes Podcast with Gordon V. Cormack, Hon. John M. Facciola, and Karl Schieneman (Feb. 13, 2013).
- 434. "Fundamentals of eDiscovery," with Jeremy R. Feinberg, Guest Lecture at Brian Donnelly's, Conrad Johnson's, and Mary Marsh Zulack's Lawyering in the Digital Age Clinic Course at Columbia Law School (New York, NY Feb. 14, 2013).

435. “Preview of the Second Annual Arizona State University (“ASU”) – Arkfeld eDiscovery and Digital Evidence Conference: Challenges Facing Those Who Want to Use Technology-Assisted Review,” with Michael R. Arkfeld, Hon. John M. Facciola, Joshua Gilliland, and Robert E. Singleton, Webinar (Feb. 19, 2013).
436. “eDiscovery and the Use of Predictive Coding: What Is It, How Does It Work, and Why Should Corporate Law Departments Use It?,” with Gordon V. Cormack and Jerone J. English, at the GULC Corporate Counsel Institute (Washington, DC Mar. 8, 2013).
437. “Part I: Are We All Stuck in TAR?,” with Mark Blaha, Matthew T. Clarke, and Scott A. Kane, eDiscovery and Digital Evidence Conference sponsored by the Center for Law, Science & Innovation at the Sandra Day O’Connor College of Law in Collaboration with Michael Arkfeld (Tempe AZ Mar. 14, 2013).
438. “Part II: TAR – Not as Sticky as it Appears,” with Mark Blaha, William P. Butterfield, and Matthew T. Clarke, eDiscovery and Digital Evidence Conference sponsored by the Center for Law, Science & Innovation at the Sandra Day O’Connor College of Law in Collaboration with Michael Arkfeld (Tempe AZ Mar. 14, 2013).
439. “Preservation and Discovery of ESI in Cloud-Based and Mobile Environments,” with Jerone J. English, Amor A. Esteban, and Eric P. Mandel, The 7th Annual Sedona Conference Institute (“TSCI”) Program on Staying Ahead of the eDiscovery Curve: Living on eDiscovery’s Cutting Edge (San Diego, CA Mar. 21, 2013).
440. “Technology-Assisted Review (‘TAR’): What, Why, When, and How,” with Paul E. Burns, Hon. James C. Francis IV, Kim-An Hernandez, Eric P. Mandel, and Sarah M. Padgitt, The 7th Annual Sedona Conference Institute (“TSCI”) Program on Staying Ahead of the eDiscovery Curve: Living on eDiscovery’s Cutting Edge (San Diego, CA Mar. 21, 2013).
441. “The Evolution and Future of the eDiscovery Team,” with Hon. James C. Francis IV, Colleen M. Kenney, Eric P. Mandel, and Sarah M. Padgitt, The 7th Annual Sedona Conference Institute (“TSCI”) Program on Staying Ahead of the eDiscovery Curve: Living on eDiscovery’s Cutting Edge (San Diego, CA Mar. 22, 2013).
442. “Ethics and the Use of Technology: “Technology-Assisted Review” as But One Example of a New Technology,” Guest Lecture at Jeremy Feinberg’s Professional Responsibility Course at Columbia Law School (New York, NY Mar. 27, 2013).
443. “The Ethics Game Show Matrimonial and Family Law Edition,” with Jeremy R. Feinberg, Nicole Hyland, Hon. Barbara Jaffe, and Wallace L. Larson, Jr., Practicing Law Institute (“PLI”) Program (New York, NY Mar. 28, 2013).
444. “Technology-Assisted Review’: What Is It, How Does It Work, and Why Should Corporate Law Departments Use It?,” Continuing Legal Education (“CLE”) Program at Gen Re (Stamford, CT Apr. 3, 2013).
445. “Government Investigations 2013: The Role of Electronic Information in Investigation and Response,” with Hon. John M. Facciola, Manfred Gabriel, Peter C. Harvey, Justin P. Murphy, and David C. Shonka, Practicing Law Institute (“PLI”) Program and Webcast (New York, NY Apr. 4, 2013).

- 446. “Choosing Your Technology: What Works Best, When and Why?,” with Daniel Kulakofsky, Cecil A. Lynn III, and Mark Risk, Seventh Annual American Bar Association (“ABA”) National Institute on E-Discovery (New York, NY Apr. 5, 2013).
- 447. “‘Technology-Assisted Review’: What Is It, How Does It Work, and Why Should Corporate Law Departments Use It?” at ConocoPhillips’ Global Attorneys Meeting (Houston, TX Apr. 9, 2013).
- 448. “‘Technology-Assisted Review’: What It Is, How It Works, and Why You Should Use It,” Guest Lecturer at Tanina Rostain’s and Roger Skalbeck’s Georgetown University Law Center Technology, Innovation, and Law Practice Course (Washington, DC Apr. 10, 2013).
- 449. “TAR Briefing,” with Gordon V. Cormack, John Rabiej, John Rosenthal, and Ian Wilson, at the April Civil Rules Advisory Committee Meeting (Norman, OK Apr. 11, 2013).
- 450. “Technology-Assisted Review in Electronic Discovery,” with Marc Wolinsky, at the Wachtell, Lipton, Rosen & Katz New York Client Seminar (New York, NY Apr. 16, 2013).
- 451. “‘Technology-Assisted Review’: What Is it, How Does It Work, and Why Should You Use It?,” eDiscovery Update 2013 for New York State Agencies, Office of the Attorney General Legal Education and Professional Development (Albany, NY Apr. 17, 2013).
- 452. “Ethical Issues in eDiscovery, Protecting Privilege, Social Media, and Data Security/Cloud Computing,” eDiscovery Update 2013 for New York State Agencies, Office of the Attorney General Legal Education and Professional Development (Albany, NY Apr. 17, 2013).
- 453. “Panel 2: Opportunities Presented and Challenges Posed by Technology-Assisted Review,” with Edward H. Cooper, Hon. John M. Facciola, Henry Kelston, and John Rosenthal, Duke Law Bench-Bar Distinguished Lawyers Conference on Technology-Assisted Review: A Critical Analysis (Washington DC Apr. 19, 2012).
- 454. “Panel 3: What is a Reasonable Technology-Assisted Review Process or Protocol?,” with Jerone J. English, Hon. Paul W. Grimm, Thomas Metzloff, and John Rosenthal, Duke Law Bench-Bar Distinguished Lawyers Conference on Technology-Assisted Review: A Critical Analysis (Washington DC Apr. 19, 2012).
- 455. “Defense of Process: General Principles, and Culling, Search, and Review Principles,” with Sarah Jane Gillett, Matthew Hammond, Christopher Q. King, Dean Kuckelman, Brendan M. Schulman, and Scott Reents, at the TSC WG1 Mid-Year Meeting and Steering Committee Retreat (St. Louis, MO Apr. 24-26, 2013).
- 456. “The Challenge of ‘BYOD’ and ‘COPE’: What’s an Employer to Do?,” with Conor R. Crowley and Ronal J. Hedges, Bloomberg BNA Webinar (May 7, 2013).
- 457. “Legal Ethics and the Cloud,” with Jeremy R. Feinberg, Practising Law Institute’s (PLI’s) Cloud Computing 2013: Cut Through the Fluff and Tackle the Critical Stuff (New York, NY May 10, 2013).
- 458. “A Lunchtime Viewing of the Seventh Circuit Pilot Project’s Video of a Mock Meet-and-Confer Regarding Technology-Assisted Review, with Discussion,” with Jennifer Keadle Mason, U.S. District Court for the Western District of Pennsylvania (Pittsburgh, PA May 13, 2013).

- 459. “Panel I: eDiscovery Basics,” with Richard Marcus, Matthew Nelson, Jonathan Redgrave, and Allison Walton, at the Center for Negotiation and Dispute Resolution at the U.C. Hastings College of Law (San Francisco, CA May 16, 2013).
- 460. “Panel III: Using Technology,” with Jerone J. English, Matthew Nelson, Steven VanLiere, and Allison Walton, at the Center for Negotiation and Dispute Resolution at the U.C. Hastings College of Law (San Francisco, CA May 16, 2013).
- 461. “Judicial Roundtable: Expectations for Best Practices and Proportionality,” with Hon. Joy Conti, Hon. John M. Facciola, and Hon. Frank Maas, FC Business Intelligence Conference on eDiscovery Project Management (Pittsburgh, PA May 21, 2013).
- 462. “Friendly Fire at the Bar,” with Thomas C. Gricks, III and Paul D. Weiner, FC Business Intelligence Conference on eDiscovery Project Management (Pittsburgh, PA May 21, 2013).
- 463. “‘Technology-Assisted Review’: What It Is, How It Works, and Why Parties Should Use It,” with Britt M. Miller, Educational Program for the Magistrate and District Judges of the Northern District of Illinois (Chicago, Ill. May 29, 2013).
- 464. “The Evolving Law on Search Techniques and Protocols,” with Michael R. Arkfeld and Hon. John M. Facciola, Georgetown University Law Center eDiscovery Training Academy (Washington, DC June 5, 2013).
- 465. “Technology-Assisted Review and Enhanced Search,” Georgetown University eDiscovery Training Academy (Washington, DC June 5, 2013).
- 466. “Third-Party, International Discovery, Privileged ESI, and Non-Waiver Agreements,” with Michael R. Arkfeld and Hon. John M. Facciola, Georgetown University Law Center eDiscovery Training Academy (Washington, DC June 6, 2013).
- 467. “Faculty Roundtable: Putting the Judges on the Spot,” with Hon. John M. Facciola, Georgetown University Law Center eDiscovery Training Academy (Washington, DC June 7, 2013).
- 468. “Technology-Assisted Review – Emerging eDiscovery Tool: Leveraging TAR to Reduce the Time and Expense of eDiscovery,” Strafford Publications Webinar (June 26, 2013).
- 469. “Search Technologies and Forward Thinking,” with Richard Cohen and Hon. Andrew J. Peck, Today’s General Counsel Institute: eDiscovery for the Corporate Market (New York, NY July 17, 2013).
- 470. “21st Century Considerations: Data Security, Social Media, and the Cloud,” with Shawn Covard, Conor R. Crowley, and Cathy Story, Today’s General Counsel Institute: eDiscovery for the Corporate Market (New York, NY July 18, 2013).
- 471. “The What, Why, When, and How of Technology-Assisted Review (“TAR”),” with Steven Berrent, Emily Cobb, and Conor R. Crowley, The Sedona Conference Institute (“TSCI”) New York (New York, NY July 25, 2013).
- 472. “Judicial Roundtable” “Tell Us What You Think About . . . ,” with Hon. Timothy S. Driscoll, Hon. James C. Francis IV, Hon. John G. Koeltl, Hon. Frank Maas, Hon. Andrew J. Peck, Hon. Shira A. Scheindlin, and Hon. Margaret Smith, The Sedona Conference Institute (“TSCI”) New York (New York, NY July 25, 2013).

- 473. “Developments in Electronic Discovery: Proposed Rules, Preservation, and Technology-Assisted Review,” with Hon. David G. Campbell, Claire V. Eagan, and Hon. T. Lane Wilson, Tenth Circuit Judicial Conference, Session 1 of 2 (Colorado Springs, CO Aug. 30, 2013).
- 474. “Developments in Electronic Discovery: Proposed Rules, Preservation, and Technology-Assisted Review,” with Hon. David G. Campbell, Claire V. Eagan, and Hon. T. Lane Wilson, Tenth Circuit Judicial Conference, Session 2 of 2 (Colorado Springs, CO Aug. 30, 2013).
- 475. “Search and Production Part I: A Technological Primer,” with Jason R. Baron, Conor R. Crowley, and Hon. David J. Waxse, Federal Judicial Center (“FJC”) eDiscovery Seminar for Federal Judges (Philadelphia, PA Sept. 10, 2013).
- 476. “Search and Production Part II: Challenges and Defenses,” with Jason R. Baron, Conor R. Crowley, and Hon. David J. Waxse, Federal Judicial Center (“FJC”) eDiscovery Seminar for Federal Judges (Philadelphia, PA Sept. 10, 2013).
- 477. “Local Initiatives and Proposed Amendments to the Federal Rules of Civil Procedure,” with Hon. Ronald J. Hedges and Kenneth J. Withers, Federal Judicial Center (“FJC”) eDiscovery Seminar for Federal Judges (Philadelphia, PA Sept. 11, 2013).
- 478. “Rule 502, Privilege, and Work Product,” with Dan Capra and Hon. David J. Waxse, Federal Judicial Center (“FJC”) eDiscovery Seminar for Federal Judges (Philadelphia, PA Sept. 11, 2013).
- 479. “Collection, Review, and Production: The Evolving Roles of People, Process, and Technology,” with R. Stanton Dodge, Sean R. Gallagher, Patrick L. Oot, and David Thomson, Institute for the Advancement of the American Legal System (“IAALS”) / The National Judicial College Second Annual Educational Summit for State Court Judges: Unlocking eDiscovery (Denver, CO Sept. 19, 2013).
- 480. “Crafting Model Orders, Guidelines, and Rules,” with Thomas Y. Allman, William P. Butterfield, William F. Dressel, Steven S. Gensler, Hon. Paul W. Grimm, Rebecca Love Kourlis, IAALS / J5dicial College Second Annual Educational Summit for State Court Judges: Unlocking eDiscovery (Denver, CO Sept. 20, 2013).
- 481. “Technology-Assisted Review, Predictive Coding, and New Search Technologies,” with Ashish S. Prasad and Brian Rocca, at Practicing Law Institute (“PLI”) Electronic Discovery Institute 2013: What Corporate and Outside Counsel Need to Know (New York, NY Sept. 24, 2013).
- 482. “An Introduction to Technology-Assisted Review,” with John J. Rosenthal and Elizabeth Treubert Simon, Rossdale Continuing Legal Education (“CLE”) Webinar on E-Discovery, Litigation Holds, and Metadata 101 (Sept. 25, 2013).
- 483. “Predictive Coding Won’t Change My Practice and Other Fairy Tales,” with Craig Ball, Hon. Paul W. Grimm, and Dera J. Nevin (Sept. 30, 2013).
- 484. “Predictive Coding,” with David Kessler and Hon. Andrew J. Peck, at the E-Discovery Trial Advocacy Institute Presented by The Huron Legal Institute in Conjunction with Sandpiper Partners (New York, NY Oct. 1, 2013).
- 485. “Fundamentals of Electronic Discovery,” Guest Lecturer at Brian Donelly’s, Conrad Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age (“LDA”) Clinic Course at Columbia Law School (New York, NY Oct. 3, 2013).

- 486. “Predicting Predictive Coding,” with Jason R. Baron and Ralph C. Losey, IT-Lex Innovate Conference (Winter Park, FL Oct. 18, 2013).
- 487. “Technology Law and Ethics in the Information Age,” with William Hamilton, Hon. Ronald J. Hedges, and Jason A. Pill, IT-Lex Innovate Conference (Winter Park, FL Oct. 18, 2013).
- 488. “Fundamentals of Electronic Discovery for New Associates,” Wachtell, Lipton, Rosen & Katz New Associate Orientation, with Luis A. McNish and Claudia T. Morgan (New York, NY Oct. 22, 2013).
- 489. “Defending eDiscovery Process: Burdens, Standards, and Best Practices,” with Scott Reents, Brendan Schulman, and Hon. Craig B. Shaffer, TSC WG1 Annual Meeting (Phoenix, AZ Nov. 7, 2013).
- 490. “Fundamentals of Technology-Assisted Review,” Video Guest Lecturer at Craig Ball’s eDiscovery Course at the University of Texas at Austin School of Law (Nov. 11, 2012).
- 491. “The Annual Judicial Roundtable,” with Hon. John M. Facciola, Hon. James C. Francis IV, Hon. Paul W. Grimm, Hon. Frank Maas, Hon. Andrew J. Peck, and David Waxse,” The Georgetown Advanced eDiscovery Institute (Ritz-Carlton, Tysons Corner VA Nov. 22, 2013).
- 492. “Fundamentals of Electronic Discovery,” with Justice Deborah Chimes, Lync Videoconference for The Justice Robert H. Jackson Center Inn of Court in Jamestown, NY (Nov. 25, 2013).
- 493. “Predictive Coding for eDiscovery,” Nineteenth Annual Advanced American Law Institute (“ALI”) Conference on Life Insurance and Financial Services Litigation, (Washington, DC Dec. 5, 2013).

2012 TALKS

- 494. “The New York Pilot for Complex Litigation and E-Discovery Order,” with Chris Dale, Karl A. Schieneman, and Ariana J. Tadler, ESIBytes Podcast (Jan. 9, 2011).
- 495. “A Primer on Technology-Assisted Review for Wachtell Lipton Paralegals,” with Luis A. McNish, Wachtell, Lipton, Rosen & Katz Training Seminar (New York, NY Jan. 11, 2012).
- 496. “2012 E-Discovery Case Law Forecast: Hindsight is 20/20,” with Dennis R. Kiker, Robert Rohlf, and Hon. David J. Waxse, Exterro Webinar (Jan. 12, 2012).
- 497. “Predictive Review: Combining the Human Element of Document Review with Machine Learning Technology,” with James Andrews, Hon. Andrew J. Peck, Jessica Ross, and Ian Wilson, Servient Luncheon Program at Le Cirque (New York, NY Jan. 24, 2012).
- 498. “Man v. Machine: The Promise and Challenge of Predictive Coding and Other Disruptive Technologies,” with Dean Gonsowski, Ralph C. Losey, and Hon. Andrew J. Peck, Symantec General Plenary Session at LegalTech New York 2012 (New York, NY Jan. 30, 2010).
- 499. “More Predictive Than Ever – Predictive Coding, Predictive Costs and Predictive Outcomes – New Techniques to Manage and Control Electronic Discovery,” with Daniel Garrie, Kathryn (“Kit”) Goetz, Joel M. Mitnick, and Warwick Sharp, Equivio Panel at LegalTech New York 2012 (New York, NY Jan. 30, 2010).

500. “Computer-Assisted Review: Streamlining Document Review in the Information Age,” with Laura Kibbe, Hon. Andrew J. Peck, David Shonka, Senior Master Steven Whitaker, Epiq Supersession at LegalTech New York (New York, NY Jan. 31, 2012).
501. “Technology-Assisted Review (“TAR”): When to Use It and How to Defend It,” with Ann Marie Gibbs, Ralph C. Losey, and Hon. Frank Maas, Daegis Panel at LegalTech New York (New York, NY Feb. 1, 2012).
502. “Judicial Panel Discussion: Evaluation, Assessment and Outcomes of Current Cases Involving eDiscovery,” with Hon. Robert Biddlecombe Collings, Hon. Frank Maas, and Hon. Craig B. Shaffer, at Q1 Production’s eDiscovery for Financial Services Conference (New York, NY Feb. 7, 2012).
503. “Using Advanced Search Technology in eDiscovery: Are We Ready for Watson?,” at Q1 Production’s eDiscovery for Financial Services Conference (New York, NY Feb. 7, 2012).
504. “Fundamentals of E-Discovery,” with Jeremy R. Feinberg, Guest Lecture at Brian Donnelly’s, Conrad Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age Clinic Course at Columbia Law School (New York, NY Feb. 9, 2012).
505. “ESI in the Courts: What Happened in 2011 and Possible Changes in 2012 and Beyond,” with Hon. John M. Facciola, Hon. Ronald J. Hedges, and Jeane A. Thomas, American Law Institute American Bar Association (“ALI-ABA”) Quarterly Webinar (Feb. 16, 2012).
506. “What Is Electronic Discovery and Why Has It Become Such an Issue?,” Columbia Law School’s Society for Law, Science & Technology (“SLST”) (New York, NY Mar. 6, 2012).
507. “Technology-Assisted Review in eDiscovery: Watson Meets Daubert?,” WebEx Presentation at Tanina Rostain’s and Roger Skalback’s Georgetown University Law Center Technology, Innovation, and Law Practice Course (Mar. 14, 2012).
508. “Technology-Assisted Review in eDiscovery: Watson Meets Daubert?,” Continuing Legal Education (“CLE”) Program at Wachtell, Lipton, Rosen & Katz (New York, NY Mar. 15, 2012).
509. “The First Amendment Meets the Internet: Struggle Trying to Distinguish Wide-Open, Often Vitriolic, Commentary on the Internet,” with Mark A. Berman, Andre A. Brochetelli, Lisa Cohen, Danielle M. DeFilippis, Richard H. Dolan, Herbert Eisenberg, Eugene Kublanovsky, Jack P. Levin, Josh Lipsman, Hon. Karla Moskowitz, Edward O’toole, Adam Pulver, Shawn J. Rabin, and Blair Russell, at the New York Inn of Court (New York, NY Mar. 21, 2012).
510. “Inadvertent Production and Loss of Privilege and Work Product Protection: What is Federal Rule of Evidence 502 and What Does It Do?,” with Hon. Ronald J. Hedges, PLI Telephone Briefing on Technology, ESI, and You (Mar. 23, 2012).
511. “Electronically Stored Information in Matrimonial Cases,” with Hon. Henry Nowak, at the New York State Judicial Institute’s 2012 Matrimonial Seminar for New York State Matrimonial Court Judges and Court Attorneys (White Plains, NY Mar. 27, 2012).
512. “Ethics and E-Discovery Searches,” with Bennett B. Borden, Thomas B. Mason, and Ellen (“Elle”) Stefani Pyle, for the E-Discovery Committee of the Litigation Section of the Washington, DC Bar Association (Washington, DC Apr. 12, 2012).

- 513. “Ethics Game Show: E-Discovery Edition,” with Hon. Timothy S. Driscoll, Jeremy R. Feinberg, Hon. James C. Francis, IV, Artemis Lekakis, and Hon. Frank Maas (New York, NY Apr. 20, 2012).
- 514. “Defense of Process: Best Practices and Guidelines,” with Robert Arnold, Sherry Harris, Henry Kelston, and Hon. Craig B. Shaffer, at The Sedona Conference Working Group 1 Mid-Year Meeting (Denver, CO Apr. 26 & 27, 2012).
- 515. “Model Orders, Default Standards, and Pilot Projects, with Kevin F. Brady, Howard Feldman, Hon. Ronald J. Hedges, Hon. Elizabeth D. Laporte, Edward Reines, Jeffrey C. Sharer, and Ariana J. Tadler, at The Sedona Conference Working Group 1 Mid-Year Meeting (Denver, CO Apr. 27, 2012).
- 516. “An Overview of the E-Discovery Process for the Judges and Clerks of the New York State Commercial Division,” with Jeremy R. Feinberg, Lunch Presentation to the New York State Unified Court System Commercial Division Judges and Clerks (New York, NY Apr. 30, 2012).
- 517. “Using Technology Assisted Review to Slash E-Discovery Costs: Opportunities, Challenges, and Ethical Considerations,” with Gordon V. Cormack and Marc Wolinsky, at the 2012 Wachtell, Lipton, Rosen, and Katz Seminar – New York (New York, NY May 2, 2012).
- 518. “Technology-Assisted Review in eDiscovery: Watson Meets Daubert?, “Continuing Legal Education (“CLE”) Program at JPMorgan Chase (New York, NY May 3, 2012).
- 519. “Tools, Technology and Process: The Three Legged eDiscovery Stool,” with Jay Leib, Patrick R. McColloch, and Susan R. Sparrow, IE Discovery’s Annual Government Symposium (Washington, DC May 10, 2012).
- 520. “Legal Ethics in the Cloud,” with Jeremy R. Feinberg, at Practising Law Institute’s (“PLI’s”) Cloud Computing 2012: Cut Through the Fluff and Tackle the Critical Stuff (New York, NY May 11, 2012).
- 521. “Practice Support Tools and the Rise of the Machine,” with Marc Lauritsen, Kingsley Martin, and Derek Schueren at the Ark Group’s Forum on Business Intelligence and Analytics for Law Firms (New York, NY May 17, 2012).
- 522. “Defending the Use of Technology-Assisted Review in eDiscovery: ‘Watson Meets Daubert,’” with Jason R. Baron, Emily A. Cobb, Jerone J. English, and Raymond B. Kim, at the American Bar Association (“ABA”) Litigation Section 6th National Institute on E-Discovery (New York, NY May 18, 2012).
- 523. “Managing ESI in Discovery: Identification, Collection, Review, and Production of ESI in Civil Litigation,” with Hon. Ronald J. Hedges, Samantha J. Lofton, and Tania Mabrey, American Law Institute American Bar Association (“ALI-ABA”) Webinar (May 30, 2012).
- 524. “The Ethics of Advocacy in the E-Discovery Sphere: What Does Competence, Candor, Fairness Require in Practice?,” with Mark A. Berman, Julia Brickell, Hon. James C. Francis IV, and Hon. Andrew J. Peck, at E-Discovery: Best Practices & Ethical Implications, New York City Bar Center for CLE (New York, NY May 30, 2012).
- 525. “Avoiding Sanctions in the Expanding Digital Universe,” with Andrew S. Baron, Hon. James C. Francis IV, Hon. Andrew J. Peck, and Sandra Rampersaud, at E-Discovery: Best Practices & Ethical Implications, New York City Bar Center for CLE (New York, NY May 30, 2012).

- 526. “Form of Production and Federal Rule of Evidence 502,” Guest Lecturer at Hon. Ronald J. Hedges’ Georgetown University Law Center Introduction to Electronic Discovery and Evidence Course (Washington, DC June 3, 2012).
- 527. “The Evolving Law on Search Techniques and Protocols,” Distinguished Lecturer at Georgetown University Law Center’s eDiscovery Training Academy (Washington DC, June 7, 2012).
- 528. “Technology-Assisted Review in eDiscovery: Watson Meets Daubert?,” Continuing Legal Education (“CLE”) Program at Genentech, Inc. (South San Francisco, CA June 11, 2012).
- 529. “Legal Ethics in the Cloud,” with Jeremy R. Feinberg, at Practising Law Institute’s (“PLI’s”) Cloud Computing 2012: Cut Through the Fluff and Tackle the Critical Stuff Program (San Francisco, CA June 11, 2012).
- 530. “Expert Roundtable,” with Ralph C. Losey, Matthew Nelson, Herbert L. Roitblat, Lisa Rosen, Jeffrey C. Sharer, and Tomas M. Thompson, at the Seventh Circuit Pilot Project Computer-Assisted Review Workshop: Mock Meet-and-Confer & Hearing and Roundtable Discussion with Industry Experts (Chicago, IL, June 14, 2012).
- 531. “Ethics and Risk Management for Privacy Professionals,” at Practising Law Institute’s (“PLI’s”) Thirteenth Annual Institute on Privacy and Security Law (New York, NY June 18, 2010).
- 532. “Electronically Stored Information in Matrimonial and Family Court Cases,” Master’s Class Sponsored by the New York City Family Court Judges Association (New York, NY June 19, 2012; Judge Ilana Gruebel; NYU Law School Vanderbilt Hall).
- 533. “Ethical Issues in E-Discovery and Cloud Computing,” Master’s Seminar on Ethics at the 2012 Annual Florida Bar Convention (Kissimmee, FL June 22, 2012).
- 534. “E-Discovery, Litigation Holds, and Metadata,” with Steven C. Bennett and James S. Zucker, Rossdale Continuing Legal Education (“CLE”) Webinar (June 27, 2012).
- 535. “Government Investigations and Demands for ESI – What’s a Corporation to Do?,” with Hon. Ronald J. Hedges and David C. Shonka, Practising Law Institute (“PLI”) Telephone Briefing on Technology, ESI, and You, (June 29, 2012).
- 536. “Demystifying Predictive Coding: Using Technology to Reduce Review Costs,” with Sean O’Grady and Carmen Oveissi Field, Deloitte Insights Video Podcast (New York, NY July 13, 2012).
- 537. “The Digital Frontier: Truth Versus Privacy,” at the 75th Annual Summer Conference of the National Council of Juvenile and Family Court Judges (New Orleans, LA July 16, 2012).
- 538. “Changing World of ESI & E-Discovery: Summer 2012 Update,” with Hon. Ronald J. Hedges, Hon. Elizabeth D. Laporte, and Jeane A. Thomas, American Law Institute Continuing Legal Education (“ALI CLE”) Quarterly Webinar (July 18, 2012).
- 539. “The Who, the What and the How of Technology Assisted Review,” with Jason Lichter, David S. Leone, and Brendan M. Schulman, The Cowen Group Leadership Breakfast (New York, NY July 19, 2012).

540. “Predictive Coding and Validation,” with Bennett B. Borden, Thomas C. Gricks III, David D. Lewis, Herbert Roitblat, and Karl Schieneman, at the Carmel Valley eDiscovery Retreat (Carmel, CA July 24, 2012).
541. “Current Issues in E-Discovery,” with Robert B. Fitzpatrick, Hon. Elizabeth D. Laporte, Hon. Matthew F. Kennelly, Hon. Rebecca R. Pallmeyer, and Hon. Craig B. Shaffer, at the 19th Annual American Law Institute Continuing Legal Education (“ALI CLE”) Current Developments in Employment Law (Santa Fe, NM July 26, 2012).
542. “Social Media Developments,” with Robert B. Fitzpatrick, Hon. Elizabeth D. Laporte, Hon. Matthew F. Kennelly, and Hon. Craig B. Shaffer, at the 19th Annual American Law Institute Continuing Legal Education (“ALI CLE”) Current Developments in Employment Law (Santa Fe, NM July 27, 2012).
543. “Can Computers Do It Better, Faster, and Cheaper—A Discussion of Predictive Coding,” with Hon. Andrew J. Peck, Jeffrey C. Sharer, Sonya Sigler, and Martin T. Tully, at the American Bar Association (“ABA”) Section of Science and Technology e-Discovery and Digital Evidence (“EDDE”) Committee Meeting (Chicago, IL Aug. 1, 2012).
544. “Attorney-Client Privilege Reviews and Inadvertent Disclosures: Conducting a Privilege Review and Leveraging FRE 502 and Clawback Agreements to Maintain Privileged Communication and Protect Work Product,” with Jennifer F. Bettrami and Sarah Gillett, Strafford Publications Webinar (Sept. 11, 2012).
545. “Defense of Process,” with Donald C. Ramsay, Michael E. Moskowitz, and Brendan M. Schulman, at The Sedona Conference Working Group on Electronic Document Retention and Production 2012 Annual Meeting (Atlanta, GA Sept. 13, 2012).
546. “Proposed Amendments to the Federal Rules,” with William P. Butterfield, Conor R. Crowley, Steven S. Gensler, and John J. Rosenthal, at The Sedona Conference Working Group on Electronic Document Retention and Production 2012 Annual Meeting (Atlanta, GA Sept. 13, 2012).
547. “E-Discovery Case Law Update II: The TAR Cases,” with Kenneth J. Withers, at The Sedona Conference Working Group on Electronic Document Retention and Production 2012 Annual Meeting (Atlanta, GA Sept. 13, 2012).
548. “Search,” with Amor A. Esteban and Hon. David J. Waxse, at the 2012 E-Discovery Seminar for Federal Judges (Baltimore, MD Sept. 19, 2012).
549. “Local Initiatives,” with Hon. Ronald J. Hedges and Kenneth J. Withers at the 2012 E-Discovery Seminar for Federal Judges (Baltimore, MD Sept. 20, 2012).
550. “Working Smarter, Working Faster, Working Cheaper: What Does Predictive Coding Really Mean For Your Business and How Can You Harness It?,” with Mark Kindy, Michael Klein, Patrick Oot, and Hon. Andrew J. Peck, at the Information Governance and eDiscovery Strategy Exchange (Washington, DC Sept. 21, 2012).
551. “The Role of Transparency and Cooperation in Technology-Assisted Review,” “Think Tank 3” at the Information Governance and eDiscovery Strategy Exchange (Washington, DC Sept. 21, 2012).
552. “Hot Topics in eDiscovery: Defensibility in eDiscovery,” with Thomas Y. Allman and Anne S. Jordan at PLI’s 2012 E-Discovery Conference (New York, NY Sept. 24, 2012).

- 553. “Okay, I’m Sold on Technology-Assisted Review – Now What?,” with Gordon V. Cormack and Conor R. Crowley, Bloomberg BNA Webinar (Sept. 25, 2012).
- 554. “Determining the Scope of Preservation,” with Michael Arkfeld, Denise Talbert, and Mark Tamburri, Legal Hold Pro 2012 Conference on Preservation Excellence (Portland, OR Sept. 27, 2012).
- 555. “The Changing Technology Landscape,” with Michael Arkfeld and Hon. Ronald J. Hedges, Legal Hold Pro 2012 Conference on Preservation Excellence (Portland, OR Sept. 28, 2012).
- 556. “Where Do We Go From Here?,” with Hon. Ronald J. Hedges, Jeane Thomas, and Paul Weiner, Legal Hold Pro 2012 Conference on Preservation Excellence (Portland, OR Sept. 28, 2012).
- 557. “Fundamentals of E-Discovery,” with Jeremy R. Feinberg, Guest Lecture at Brian Donnelly’s, Conrad Johnson’s, and Mary Marsh Zulack’s Lawyering in the Digital Age Clinic Course at Columbia Law School (New York, NY Oct. 1, 2012).
- 558. “Rule 502 Symposium,” Advisory Committee on Evidence Rules (Charleston, SC Oct. 5, 2012).
- 559. “The Evolving Practice and Case Law on Search: Technology-Assisted Review,” Presentation to the Committee on Professional Ethics of the Association of the Bar of the City of New York (Oct. 11, 2012).
- 560. “A Practitioner’s Guide to Statistical Sampling in eDiscovery,” with Gordon V. Cormack, Maureen O’Neill, and Jim Wagner, DiscoverReady Webinar (Oct. 16, 2012).
- 561. “Fundamentals of Electronic Discovery for New Associates,” with Luis A. McNish, Wachtell, Lipton, Rosen & Katz New Associate Training (New York, NY Oct. 16, 2012).
- 562. “‘Technology-Assisted Review’: What It is, How It Works, and Why You Should Care,” at Columbia Law School’s Society for Law, Science & Technology (“SLST”) (New York, NY Oct. 18, 2012).
- 563. “E-Discovery: Where Are We? What’s to Come?,” with Stephen Y. Chow, Hon. Robert B. Collings, Martha A. Mazzone, and Kenneth J. Withers, Bench and Bar Conference of the United States District Court for the District of Massachusetts: Changing Landscapes in Law, Legal Practice and Beyond (Newton, MA Oct. 19, 2012).
- 564. “Ethics and the Use of Technology: ‘Technology-Assisted Review’ as an Example of a New Technology,” Guest Lecturer at Jeremy R. Feinberg’s Professional Responsibility Course at Columbia Law School (New York, NY Oct. 22, 2012).
- 565. “Ethical Issues in E-Discovery, Social Media and the Cloud,” with Hon. Ronald J. Hedges, Rutgers Law and Technology Law Journal Symposium (Newark, NJ Oct. 23, 2012).
- 566. “Asking the Right Questions: The Challenge of Big Data,” with V. Mary Abraham, Chad C. Ergun, and Joshua Fireman, at Ark Group’s Eighth Annual Knowledge Management in the Legal Profession Conference (New York, NY Oct. 25, 2012).
- 567. “Ethical Issues in Litigation: Ethics and the Internet—Social Media and Cloud Computing,” with Hon. Charles E. Bullock, Michael L. Doane, and Douglas R. Nemea, at the American Intellectual Property Law Association (“AIPAL”) Annual Conference (Washington, DC Oct. 26, 2012).

568. “‘Technology-Assisted Review’: What It Is, How It Works, and Why You should Care,” Guest Lecturer at Craig Ball’s eDiscovery Course at the University of Texas at Austin School of Law (Austin, TX Oct. 29, 2012).
569. “‘Technology-Assisted Review’: Evolving Case Law and Practice,” American Bar Association (“ABA”) Section of Science and Technology e-Discovery and Digital Evidence (“EDDE”) eMeeting / WebEx (Nov. 1, 2012).
570. “Ethics and Professionalism: Social Media and Cloud Computing,” at the State Bar of Georgia (Atlanta, GA Nov. 2, 2012).
571. “Technology-Assisted Review: Evolving Case Law and Practice,” with Gordon V. Cormack, Practicing Law Institute (“PLI”) Telephone Briefing on Technology, ESI, and You (Nov. 12, 2012).
572. “Some Thoughts on Technology-Assisted Review,” Guest Lecturer at John M. Barkett’s E-Discovery Course at the University of Miami Law School (Miami, FL Nov. 13, 2012).
573. “‘Predictive Coding’: What Is It, How Does It Work, and Why Should You Use It?,” at the 11th Annual Energy Litigation Conference, Institute for Energy Law of The Center for American and International Law, American Bar Association (“ABA”) Section of Environment, Energy and Resources, and ABA Energy Litigation Committee of the Section of Litigation (Houston, TX Nov. 15, 2012).
574. “The Ethics of Technology-Assisted Review,” with John M. Barkett and Kenneth J. Withers, ABA Webinar (Nov. 20, 2012).
575. “Plain Talk on Technology-Assisted Review,” with Craig Ball, American Law Institute (“ALI”) Continuing Legal Education (“CLE”) Program (Dec. 5, 2012).
576. “Measuring, Validating, and Defending Your Technology-Assisted Review: What Metrics and Measurements are Necessary or Appropriate?,” with Herbert L. Roitblat, David D. Lewis, Ian Soboroff, and Ian Wilson, Georgetown Advanced E-Discovery Institute (Ritz-Carlton, Tyson's Corner, VA Dec. 6, 2012).
577. “Technology-Assisted Review: Evolving Case Law and Practice,” at the New Jersey Chapter of Women in eDiscovery (Parsippany, NJ Dec. 11, 2012).
578. “2012 eDiscovery Case Law Review: The 3 P’s for 2013,” with Scott Giordano, Hon. Ronald J. Hedges, and Jeane A. Thomas, Exterro Webinar (Dec. 12, 2012).
579. “Technology-Assisted Review: Evolving Case Law and Practice,” with Gordon V. Cormack, Videotaping at the New York State Judicial Institute (White Plains, NY Dec. 13, 2012).
580. “Technology-Assisted Review: Evolving Case Law and Practice,” with Michael Dalewitz, at the New York Metropolitan Area Chapter of the Association of Litigation Support Professional (“ALSP”) (New York, NY Dec. 20, 2012).

2011 TALKS

581. “Fundamentals of E-Discovery,” for the Federal Practice Committee of the United States District Court for the District of Nebraska (Lincoln and Omaha, NE Jan. 7, 2010).

582. “Electronic Data in Litigation: Trends and Developments (ESI Quarterly Winter 2011),” with Ronald J. Hedges and Jeane A. Thomas, American Law Institute / American Bar Association (ALI-ABA) Audio Webcast Program (Jan. 12, 2010).
583. “Ethics in the Electronic Age: Be Careful When Using That Cell Phone, Blackberry, Blog, Social Network,” with Jeremy R. Feinberg, David A. Lewis, and Alan Winchester, at the Association of the Bar of the City of New York (New York, NY Jan. 20, 2011).
584. “Potential Minefields and Dispute Resolution Strategies for E-Discovery in Arbitration,” Webcast for West Professional Development, a Thompson Reuters Business (Jan. 25, 2011).
585. “Statistical Sampling for Dummies: Applying Measurement Techniques in eDiscovery,” LDM Global Webinar with Gordon V. Cormack and Scott W. Merrick (Jan. 27, 2011).
586. “Next Decade of Document Review: Cheaper, Better, Smarter,” with Beth A. Koehler, Hon. Andrew J. Peck, Christopher D. Wall, and John M. Wilan, Kroll Ontrack Litigation Technologies Workshop at LegalTech New York (New York, NY Feb. 1, 2011).
587. “Introduction to ESI Search,” with Gene Eames, Sam McCollum, and Rudy Rouhana, Daegis Panel at LegalTech New York (New York, NY Feb. 2, 2011).
588. “Topics in Data Analytics and Legal Search,” with Gene Eames, Anne Marie Gibbs, and Doug Stewart, Daegis Panel at LegalTech New York (New York, NY Feb. 2, 2011).
589. “Form of Production, Privilege, Federal Rule of Evidence 502, and Ethics” Guest Lecturer with Hon. John M. Facciola, at Hon. Ronald J. Hedges’ Georgetown University Law Center Introduction to Electronic Discovery and Evidence Course (Washington, DC Feb. 5, 2011).
590. “Some Things You Should Know About E-Discovery,” Wachtell, Lipton, Rosen & Katz Continuing Legal Education (“CLE”) Program (New York, NY Feb. 9, 2011).
591. “Some Things You Should Know About E-Discovery,” Guest Lecturer with Jeremy R. Feinberg, at Brian Donnelly’s, Conrad Johnson’s and Mary Zulack’s Columbia Law School Digital Law Clinic Course (New York, NY Feb. 10, 2011).
592. “Sampling for eDiscovery Made Easy,” with Prof. Gordon V. Cormack, Bureau of National Affairs (“BNA”) Webinar (Feb. 15, 2011).
593. “Using the Cloud to Deliver Legal Process Outsourcing: Risks and Ethical Considerations,” with Paul J.R. Roy, at the International Quality and Productivity Center (“IQPC”) Legal Process Outsourcing Summit (Feb. 16, 2011 New York, NY).
594. “Practitioners’ Update,” with Joseph M. Burton, Prof. Richard L. Marcus, Michael J. McGuire, Steven Teppler, and Lucy Thompson, at the Second Annual Electronic Discovery and Digital Evidence Practitioners’ Workshop, sponsored by the American Bar Association’s (“ABA’s”) Section of Science & Technology Law e-Discovery and Digital Evidence (“EDDE”) Committee (San Francisco, CA Feb 18, 2011).
595. “Search: Trends, Myths, and Reality,” with Prof. Gordon V. Cormack and Bruce Hedin, at the Second Annual Electronic Discovery and Digital Evidence Practitioners’ Workshop, sponsored by the American

Bar Association's ("ABA's") Section of Science & Technology Law e-Discovery and Digital Evidence ("EDDE") Committee (San Francisco, CA Feb. 18, 2011).

- 596. "Ethics Panel," with Hon. Gail A. Andler, Hon. John M. Facciola, Prof. Geoffrey C. Hazard, Hon. Frank Maas, and Hon. Andrew J. Peck, at the Second Annual Electronic Discovery and Digital Evidence Practitioners' Workshop, sponsored by the American Bar Association's ("ABA's") Section of Science & Technology Law e-Discovery and Digital Evidence ("EDDE") Committee (San Francisco, CA Feb. 19, 2011).
- 597. "Advanced Search Techniques in E-Discovery," Training Program for Wachtell, Lipton, Rosen & Katz's Automated Legal Support Department Managers (New York, NY Feb. 22, 2011).
- 598. "Taming the ESI Beast: Judicial Management and Other Strategies to Lower Costs and Expedite Cases," with Kenneth J. Withers, at the Annual Judges' Retreat of the U.S. District Court for the Western District of Missouri (Kansas City, MO Feb. 25, 2011).
- 599. "Test Your Ethics 2011: A Discussion of Real Word Ethical Issues," with Jeremy R. Feinberg, Thaddeus Hackworth, John Vagelatos, and Sara Walshe, for New York Corporation Counsel (Brooklyn, NY Feb. 28, 2011).
- 600. "Technology-Assisted Review Can be More Effective and More Efficient Than Exhaustive Manual Review," Richmond Journal of Law and Technology Symposium on "Shooting Fish in a Bottomless Barrel: Electronic Discovery in a World of Cloud Computing, Data Hoarding and Social Networking" (Richmond, VA Mar. 3, 2011).
- 601. "Pension Committee Revisited," with Chris Bright, Brad Harris, and Ronald J. Hedges, Legal Hold Pro Webinar (Mar. 4, 2011).
- 602. "Caselaw and Rules Update," with Kathryn Burkett Dickson, Hon. Luisa S. Porter, Hon. Carl J. West, and Kenneth J. Withers The 5th Annual Sedona Conference Institute Program on Staying Ahead of the eDiscovery Curve: Strategies to Reduce Costs and Meet Judicial Expectations (San Diego, CA Mar. 17, 2011).
- 603. "Proportionality in Preservation & Discovery," with Hon. Gail A. Andler, Paul E. Burns, Jerone J. English, Hon. Elizabeth D. Laporte, Jonathan M. Redgrave, and Joseph R. Saveri, at The 5th Annual Sedona Conference Institute ("TSCI") Program on Staying Ahead of the eDiscovery Curve: Strategies to Reduce Costs and Meet Judicial Expectations (San Diego, CA Mar. 17, 2011).
- 604. "Cooperation Guidance for In-House Counsel & Litigators," with Jerone J. English, Cecil A. Lynn, Hon. Louisa S. Porter, Joseph R. Saveri, Hon Carl J. West, and Kenneth J. Withers, at The 5th Annual Sedona Conference Institute ("TSCI") Program on Staying Ahead of the eDiscovery Curve: Strategies to Reduce Costs and Meet Judicial Expectations (San Diego, CA Mar. 17, 2011).
- 605. "Ethical Obligations & Issues in eDiscovery," with Jason R. Baron, Laura Buckland, Hon. Elizabeth D. Laporte, and Patrick L. Oot, at The 5th Annual Sedona Conference Institute ("TSCI") Program on Staying Ahead of the eDiscovery Curve: Strategies to Reduce Costs and Meet Judicial Expectations (San Diego, CA Mar. 17, 2011).
- 606. "Electronic Discovery," with Yalkin Demirkaya, Hon. James P. Flanagan, Sal Llannera, and Hon. Emily Pines, at the Suffolk County Bar Association / Suffolk Academy of Law (Hauppauge, NY Mar. 23, 2011).

- 607. “Fundamentals of E-Discovery and Social Media,” CLE Program for the Law Clerks and Court Attorneys of the New York State Court of Claims (Saratoga Springs, NY Mar. 30, 2011).
- 608. “The Top Ten (or So) E-Discovery Predictions for 2011,” with Ronald J. Hedges, The Association of Litigation Support Professionals (ALSP) Webinar (Mar. 31, 2011).
- 609. “The Ethics Game Show: E-Discovery Edition 2011,” with Jeremy R. Feinberg, Hon. James C. Francis IV, Hon. Frank Maas, and Allison J. Schoenthal, at Practising Law Institute (“PLI”) (New York, NY Apr. 1, 2011).
- 610. Presentation on Search & TREC, with Jason R. Baron, at the Richard K. Herrmann Technology Inn of Court (Wilmington, DE Apr. 11, 2011).
- 611. “The Electronic Age: How Courts are Dealing With Major Issues,” (ESI Quarterly Spring 2011),” with Hon. Paul W. Grimm, Hon. Ronald J. Hedges and Jeane A. Thomas, American Law Institute / American Bar Association (“ALI-ABA”) Audio Webcast Program (Apr. 13, 2011).
- 612. “Technology-Assisted Review Can be More Effective and More Efficient Than Exhaustive Manual Review,” at the Educating the Digital Lawyer Workshop at Columbia Law School (New York, NY Apr. 14, 2011).
- 613. “Rule 45 Subpoenas and Non-Party Production Issues in Electronic Discovery: Assessing the Burdens and Costs and Avoiding the Pitfalls,” with Anne Marie Gibbs and Babette V.E. Orenstein, Lorman Education Services Teleconference (Apr. 15, 2011).
- 614. “Ethics in the Electronic Age: How to Avoid Pitfalls When Using Your Gadgets,” Continuing Legal Education (“CLE”) Program for the New York Appellate Division Second Department, with Jeremy R. Feinberg, David A. Lewis, and Alan Winchester (Brooklyn, NY Weds. Apr. 20, 2011).
- 615. “Statistical Sampling for Dummies: Applying Measurement Techniques in eDiscovery,” with Gordon V. Cormack, The Association of Litigation Support Professionals (“ALSP”) Webinar (Apr. 21, 2011).
- 616. “The Sedona Principles, 3rd Edition, Principle 14: Sanctions & Preservation,” with Kevin F. Brady, William P. Butterfield, Conor R. Crowley, and John Luken, at The Sedona Conference Working Group on Electronic Document Retention & Production 2011 Mid-Year Meeting (Ft. Lauderdale, FL Apr. 28, 2011).
- 617. “Electronic Discovery Presentation for the Appellate Division First Department’s Law Clerks, Court Attorneys, and Staff,” with Mark Berman and James G. Ryan (New York, NY May 2, 2011).
- 618. “E-Discovery in the State Courts: Case Law and Rules Developments,” with Thomas Y. Allman, Hon. Ralph Artigliere, and Hon. Donald F. Parsons, Jr., and Kenneth J. Withers, Sedona Conference Webinar (May 3, 2011).
- 619. “Practical Considerations In Approaching Electronic Discovery,” with Sean Broderick, Andrew D. Goldsmith, and Hon. Peggy A. Leen, at the Annual District Court Training for the District of Nevada (Las Vegas, NV May 5, 2011).
- 620. “Balancing Privacy and Public Interest in the ‘Electronic Age’: Is There a Balance? Are There Irreconcilable Differences?,” with Karen Eltis, Natalie Gomez-Velez, and Stephen Schultze, at the

Princeton University Center for Information Technology Policy's Conference on "Privacy, Access and Technology and the Future of Litigation in the United States" (Princeton, NJ May 13, 2011).

- 621. "Cutting-Edge Search & Document Review: A Brave New World of Automation?," with Jason R. Baron, Monica McCarroll, and Howard J.C. Nicols, at the American Bar Association Section on Litigation's Fifth Annual National Institute on E-Discovery: Practical Solutions for Dealing with Electronically Stored Information (ESI)" (Washington, DC May 19, 2011).
- 622. "New Frontiers in E-Discovery and the Government Lawyer," with Chris May, David Shonka, and Terry Sweeney, at IE Discovery's Fourth Annual Electronic Discovery Symposium for Governmental Agencies (Washington, DC May 19, 2011).
- 623. "Can Technology Beat Humans at Document Review?," with Gordon V. Cormack, Bureau of National Affairs ("BNA") Webinar (May 26, 2011).
- 624. "Inconsistent Assessment of Responsiveness in E-Discovery: Difference of Opinion or Human Error?," with Gordon V. Cormack, Workshop on Setting Standards for Searching Electronically Stored Information in Discovery Proceedings ("DESI-IV"), at the 13th International Conference on Artificial Intelligence and the Law ("ICAIL 2011") (Pittsburgh, PA June 6, 2011).
- 625. "How to Conduct a Better Search . . . The Specifics," with Jason R. Baron and Jennifer Kneadle Mason, at The Western Pennsylvania Chapter of the Federal Bar Association's ("FBA's") "School's NOT Out for the Summer: The 2011 FBA E-Discovery Summer Series" (Pittsburgh, PA June 7, 2011).
- 626. "The Evolving Law on Search Techniques & Protocols," with Jason R. Baron, at the Georgetown Law Center's eDiscovery Training Academy (Washington, DC June 9, 2011).
- 627. "Form of Production, Accessible / Not Reasonably Accessible ESI, Cost Sharing / Shifting, Privilege and Federal Rule of Evidence 502, and Ethics." Guest Lecturer at Hon. Ronald J. Hedges' Georgetown University Law Center Introduction to Electronic Discovery and Evidence Course (Washington, DC June 12, 2011).
- 628. "Overview of Electronic Discovery: An Update on New York State Case Law and Developments," with Mark A. Berman, James G. Ryan, and Alan M. Winchester, American Law Institute / American Bar Association ("ALI-ABA") Audio Webcast Program (June. 14, 2011).
- 629. "Government Investigations: E-Discovery Nuts, Bolts, and Defensible Search Strategies—New Developments and Critical Considerations," with Lisa Habbeshaw and Hon. Ronald J. Hedges, District of Columbia Federal Bar Association Webinar (June 15, 2011).
- 630. "The Latest in Search Trends for Litigators & In-House Counsel," with Jason R. Baron, Gordon V. Cormack, and Hon. Frank Maas, American Law Institute / American Bar Association ("ALI-ABA") Audio Webcast Program (June 16, 2011).
- 631. "Should I Friend the Judge and Other Current Ethical Challenges for Lawyers," at Practicing Law Institute's ("PLI's") Twelfth Annual Institute on Privacy and Security Law (New York, NY, June 21, 2011).
- 632. "Form of Production," with Conor R. Crowley and Hon. James C. Francis IV, at the Federal Judicial Center's E-Discovery Seminar for Federal Judges (Charleston, SC June 29, 2011).

- 633. “Search Techniques,” with Kenneth J. Withers, at the Federal Judicial Center's E-Discovery Seminar for Federal Judges (Charleston, SC June 30, 2011).
- 634. “Rule 502, Privilege & Work Product,” with Hon. John M. Facciola and Kenneth J. Withers, at the Federal Judicial Center’s E-Discovery Seminar for Federal Judges (Charleston, SC June 30, 2011).
- 635. “Studies on Human Versus Technology-Assisted Review in E-Discovery,” with Gordon V. Cormack and Karl Schieneman, ESIBytes Podcast (July 7, 2011).
- 636. “Fundamentals of E-Discovery for New York State Unified Court System,” with Jeremy R. Feinberg, Videocast Program for the New York State Unified Court System (New York, NY July 26, 2011).
- 637. “This Really Happened: A Review of Real World Ethical Issues 2011,” with Hon. Sheila Abdus-Salaam, Jeremy R. Feinberg, Artemis Letakis, and Elizabeth Rotenberg-Schwartz, at Practicing Law Institute (“PLI”) (New York, NY July 27, 2011).
- 638. “Back to Basics: A Technical Primer on E-Discovery,” with Jake Frazier, Hon. Andrew J. Peck, and Annette (“Toni”) Tomarazzo, Federal Bar Council (New York, NY Aug. 3, 2011)
- 639. “eDiscovery Outlook: Is Technology-Assisted Review Supporting Attorneys or Replacing Them?,” with Gordon V. Cormack, Mary Mack, and Johannes C. Scholtes, Zylab Webinar (Aug. 4, 2011).
- 640. “Emerging Trends in Search & Document Review: Are We Ready for Watson?,” with Bennett B. Borden and Gordon V. Cormack, and Hon. Frank Maas, at the Third Electronic Discovery and Digital Evidence Practitioners' Workshop, sponsored by the American Law Institute / American Bar Association Section of Science & Technology Law (“ALI-ABA”) (New York, NY Aug. 15, 2011).
- 641. “Early Case Assessment: How to Get the Information You Need and What To Do With it When You Get It,” with Deborah Baron, Deborah R. Bernard, Heather Hughes, Emily Stapf, and Steven Tepler, at the Third Electronic Discovery and Digital Evidence Practitioner’ Workshop, sponsored by the American Law Institute / American Bar Association Section of Science & Technology Law (“ALI-ABA”) (New York, NY Aug. 15, 2011).
- 642. “E-Discovery and Ethics,” with Jeremy R. Feinberg, Hon. Frank Maas, and Hon. Karla Spaulding, at the Third Electronic Discovery and Digital Evidence Practitioners’ Workshop, sponsored by the American Law Institute / American Bar Association Section of Science & Technology Law (“ALI-ABA”) (New York, NY Aug. 16, 2011).
- 643. Federal Civil Rules Committee Mini-Conference (Dallas/Fort Worth, TX Sept. 9, 2011).
- 644. “Fundamentals of Electronic Discovery for New Associates,” with Luis A. McNish, Wachtell, Lipton, Rosen & Katz CLE Program (New York, NY Sept. 14, 2011).
- 645. “Predictive Coding—Overcoming Barriers to Entry,” with Keith Bernstein, Anne Kershaw, Aaron Laliberte, and Dawn Johnson, The Association of Litigation Support Professionals (“ALSP”) (Boston, MA Sept. 15, 2011).
- 646. “The Challenges of New Media: Facebook, Twitter, the Cloud, and Beyond....,” with Thomas Y. Allman and Hon. Ronald J. Hedges, Practicing law Institute’s (“PLI’s”) Electronic Discovery Guidance 2011: What Corporate and Outside Counsel Need to Know (New York, NY Sept. 19, 2011).

- 647. “Understanding and Managing Risks in Cross-Border eDiscovery,” at the September Meeting of the New Jersey Chapter of Women in E-Discovery (Parsippany, NJ Sept. 20, 2011).
- 648. “Cross-Border E-Discovery: Meeting the Challenges and Mitigating the Risks,” with Richard Kershaw, Catalyst Webinar (Sept. 21, 2011).
- 649. “Session 3: Dealing with the Challenges of Legal Holds: Pension Committee, Rimkus & Progeny,” with James Daley, Michael Moore, and Tom O’Connor, at Executive Counsel Institute’s E-Discovery for the Corporate Market Conference: “The Exchange” (Houston, TX Sept 22, 2011).
- 650. “Session 6: Effective Cost and Risk Containment Steps to Achieve Proportionality,” with James Daley, John Schwab, and Paul Weiner, at Executive Counsel Institutes’ E-Discovery for the Corporate market Conference: “The Exchange” (Houston, TX Sept 22, 2011).
- 651. “The Future of E-Discovery: Top Ten Trends and Predictions,” with Hon. Ronald J. Hedges and Chuck Pindell, Legal Service Providers Association (“LSPA”) Webinar sponsored by iCONNECT Development, LLC (Sept. 28, 2011).
- 652. “Some Things You Should Know About E-Discovery,” Guest Lecturer with Jeremy R. Feinberg, at Brian Donnelly’s, Conrad Johnson’s and Mary Zulack’s Columbia Law School Digital Law Clinic Course (New York, NY Oct. 3, 2011).
- 653. “Fundamentals of Electronic Discovery for New Associates,” with Luis A. McNish, Wachtell, Lipton, Rosen & Katz CLE Program (New York, NY Oct. 4, 2011).
- 654. “Women Thought Leader Panel: E-Discovery Today, Tomorrow and in the Far Away Future,” with Michelle Briggs-Treadwell, Alitia Faccone, Caitlin Murphy, Allison Stanton, and Susan V. Watson, at the Masters Conference (Washington, DC Oct. 4, 2011).
- 655. “Search and Retrieval: 2011 Update,” with Jason R. Baron and Ashish S. Prasad, at The Sedona Conference Annual Meeting (Austin, TX Oct. 7, 2011).
- 656. “Sampling: An eDiscovery Primer,” with Chris May, IE Discovery Seminar for Government Attorneys (Chevy Chase, MD Oct. 12, 2011).
- 657. “E-Discovery Search Tools and Techniques for RIM Professionals,” with Chris May, at the 2011 ARMA International Conference & Expo (Washington, DC Oct, 19, 2011).
- 658. “International Considerations for E-Discovery”, with Hampton Coley and Theresa L. Widmann, at the October Meeting of the New York City Chapter of Women in E-Discovery (New York, NY Oct. 20, 2011).
- 659. “eDiscovery in Transition: New Trends and FRCP Amendments on the Horizon,” with Hon. John M. Facciola, Hon. Ronald J. Hedges, and Jeane A. Thomas, ESI Quarterly Fall 2011, American Law Institute / American Bar Association (“ALI-ABA”) Audio Webcast Program (Oct. 25, 2011).
- 660. “E-Discovery, Litigation Holds & Metadata Best Practices,” with Steven C. Bennett and Michael E. Lackey, Rossdale Continuing Legal Education (“CLE”) Webinar (Oct. 26, 2011).

- 661. “Disruptive Technologies / Innovative Thinking,” with Richard S. Granat, Marc Lauritsen, and Kingsley Martin, at the 2011 Futures Conference & Annual Meeting of the College of Law Practice Management (Chicago, IL Oct. 28, 2011).
- 662. “Ethics and the Use of Technology,” Guest Lecturer at Jeremy R. Feinberg’s Professional Responsibility Course at Columbia Law School (New York, NY Oct. 31, 2011).
- 663. “Sampling: An eDiscovery Primer,” with Chris May, IE Discovery Seminar Webinar (Nov. 2, 2011).
- 664. “European Cross-Border Data Protection,” Luncheon Sponsored by H7b1, LexisNexis, IPRO TECH, and Equivio (New York, NY Nov. 9, 2011).
- 665. “Defensible Document Review Using Advanced Technology,” with Daniel K. Gelb, Thomas Shields, Thomas Svoboda, and Kenneth J. Withers, The Sedona Conference “Voices From the Desert” Webinar (Nov. 10, 2011).
- 666. “The Lawyer’s Perspective,” at the NSF IIS Program E-Discovery Grant Advisory Board Meeting at the University of Maryland (College Park, MD Nov. 14, 2011).
- 667. “TREC 2011 Legal Track Overview,” with Gordon V. Cormack, at the TREC 2011 Legal Track Workshop (Gaithersburg, MD Nov. 15, 2011).
- 668. “Defending the Use of Analytical Software in Civil Discovery,” with Conor R. Crowley, Laura Kibbe, Hon. Elizabeth D. Laporte, and Howard J.C. Nicols, at the Georgetown University Law Center 2011 Advanced E-Discovery Institute (Crystal City, VA Nov. 18, 2011).
- 669. “The Challenges of New Media: Facebook, Twitter, the Cloud, and Beyond....,” with David E. Garrett and Hon. Ronald J. Hedges, Practicing law Institute’s (“PLI’s”) Electronic Discovery Guidance 2011: What Corporate and Outside Counsel Need to Know (San Francisco, CA Dec. 2, 2011).
- 670. “E-Discovery in Matrimonial Cases,” With Hon. John M. Curran and Hon. Henry J. Nowak, at the Bar Association of Erie County (Buffalo, NY Dec. 12, 2011).

2010 TALKS

- 671. “Ethics in the Electronic Age for New York State Court Attorneys,” with Jeremy R. Feinberg, at the 2009/2010 Legal Update Program sponsored by the New York State Judicial Institute (White Plains, NY Jan. 11, 2010).
- 672. “Ethics in the Electronic Age for New York State Court Attorneys,” with Jeremy R. Feinberg, at the 2009/2010 Legal Update Program sponsored by the New York State Judicial Institute (White Plains, NY Jan. 14, 2010).
- 673. “E-Discovery Lunch and Learn I,” for the Automated Legal Support (ALS) Department at Wachtell, Lipton, Rosen & Katz (New York, NY Jan. 15, 2010).
- 674. “Searching for ESI in All the Wrong Places: What Every Lawyer Needs to Know About Using Search Tools in E-Discovery,” with Terry Sweeney, IE Discovery Webcast (Jan. 20, 2010).

675. “E-Discovery Ethics,” with Hon. John L. Carroll, William (“Bill”) F. Hamilton, and Kenneth J. Withers, The Sedona Conference Voices From the Desert Webinar Series (Jan. 20, 2010).
676. “Ethics in the Electronic Age: Be Careful When Using That Cell Phone, Blackberry, Blog, Social Network...,” with Melissa A. Crane, Jeremy R. Feinberg, David A. Lewis, and Hon. Jacqueline W. Silbermann, at the Association of the Bar of the City of New York (New York, NY Jan 21, 2010).
677. “Issue Area 1: Preservation,” with Matthew Cohen, M. James Daley, and Jonathan M. Redgrave, at The Sedona Conference Training Program on eDiscovery Dispute Resolution for Special Masters and Mediators, presented in association with the Academy of Court-Appointed Masters (ACAM) (Phoenix, AZ Jan. 28, 2010).
678. “Issue Area 4: Search Terms & Methodology,” with Matthew Cohen, M. James Daley, John H. Jessen, and Timothy L. Moorehead, at The Sedona Conference Training Program on eDiscovery Dispute Resolution for Special Masters and Mediators, presented in association with the Academy of Court-Appointed Masters (“ACAM”), (Phoenix, AZ Jan. 28, 2010).
679. “Issue Area 6: Privilege,” with Hon. John M. Facciola, Jonathan M. Redgrave, and Hon. Shira A. Scheindlin, at The Sedona Conference Training Program on eDiscovery Dispute Resolution for Special Masters and Mediators, presented in association with the Academy of Court-Appointed Masters (“ACAM”) (Phoenix, AZ Jan. 29, 2010).
680. “EU Data Protection Rules and Their Practical Implementation: How do Corporations Respond to US Litigation and Regulatory Matters Involving Data Held in the EU Without Running Afoul of the Rules? - Part I,” with Chris Dale, Browning E. Marean III, Nigel Murray, Vince Neicho, Hon. Andrew J. Peck, George I. Rudoy, and Senior Master Steven Whitaker, panel sponsored by Trilantic at LegalTech New York 2010 (New York, NY Feb. 1, 2010).
681. “EU Data Protection Rules and Their Practical Implementation: How do Corporations Respond to US Litigation and Regulatory Matters Involving Data Held in the EU Without Running Afoul of the Rules? - Part II,” with Chris Dale, Browning E. Marean III, Nigel Murray, Vince Neicho, Hon. Andrew J. Peck, George I. Rudoy, and Senior Master Steven Whitaker, panel sponsored by Trilantic at LegalTech New York 2010 (New York, NY Feb. 1, 2010).
682. “Shifts in Legal Paradigms: Towards Defensible Search and Review,” with Claudia M. Cohen, Jennifer R. Martin, and Hon. Andrew J. Peck, panel sponsored by Stroz Friedberg at LegalTech New York 2010 (New York NY Feb. 2, 2010).
683. “What Keeps Me Up at Night and What Drives Me Crazy About E-Discovery,” with Shawwna Childress, Hon. Katharine Sweeney Hayden, Carmen Oveissi Field, and Babette V.E. Orenstein, panel sponsored by Women in eDiscovery at LegalTech New York 2010 (New York NY Feb 2, 2010).
684. “Thoughts on Pension Committee of the University of Montreal Pension Plan v. Banc of America Securities, LLC, Working with Clients on Implementing Legal Holds, and Other Topics,” with Browning E. Marean III and Tom O’Connor, e-Discovery Zone Video sponsored by TechLaw Solutions in Connection with LegalTech New York 2010 (New York, NY Feb. 3, 2010).
685. “Cloud Computing & Web 2.0: Discovery Challenges for Lawyers,” with Hon. Ronald J. Hedges and Jeane A. Thomas, American Law Institute / American Bar Association (“ALI-ABA”) Audio Webcast Program (Feb. 12, 2010).

- 686. “‘Triggers,’ Preservation, and Search; Form of Production; Accessible / Not Reasonably Accessible Information; Privilege and Federal Rule of Evidence 502,” Guest Lecturer at Hon. Ronald J. Hedges’ Georgetown University Law Center Introduction to Electronic Discovery and Evidence Course (Washington, DC Feb. 13, 2010).
- 687. “Current Trends in Search & Retrieval and Best Practices in Project Management,” Presentation at AlphaLit Corporate Headquarters (Huntington Valley, PA Feb. 19, 2010).
- 688. “Ethics in the Electronic Age for New York State Court Attorneys,” at the 2009/2010 Legal Update Program sponsored by the New York State Judicial Institute (Uniondale, NY Feb. 23, 2010).
- 689. “Roundtable on Ethics and Electronic Evidence,” Guest Lecturer with William P. Butterfield, Patrick L. Oot, and Jeane A. Thomas, at Hon. Ronald J. Hedges’ Georgetown University Law Center Introduction to Electronic Discovery and Evidence Course (Washington, DC Feb. 27, 2010).
- 690. “Judge Scheindlin revisits Zubulake: Assessing the Impact of Pension Committee v. Banc of America Securities LLC, with Kevin F. Brady, Hon. Paul W. Grimm, and Hon. Ronald J. Hedges, Bureau of National Affairs (“BNA”) Audioconference (Mar. 2, 2010).
- 691. “Ethics in the Electronic Age for New York State Court Attorneys,” with Jeremy R. Feinberg, at the 2009/2010 Legal Update Program sponsored by the New York State Judicial Institute (Uniondale, NY Mar. 3, 2010).
- 692. “Mapping Out the Steps to the E-Discovery Process,” with Kevin F. Brady, at the Georgetown University Law Center E-Discovery Training Academy (Washington, DC Mar. 8, 2010).
- 693. “The Keys to eDiscovery Project Management,” with Scott W. Merrick, LDM Global Webinar (Mar. 11, 2010).
- 694. “It’s 2010, Do You Know Where Your Records Are: The Status of Search & Retrieval and the Role of Records & Information Management in eDiscovery,” at the American Records Management Association (ARMA) 2010 MetroNYC Educational Workshop (New York, NY Mar. 18, 2010).
- 695. “E-Discovery in 2010,” Guest Lecturer with Hon. Ronald J. Hedges, at Adam I. Cohen’s and Steven C. Bennett’s Fordham University School of Law Electronic Discovery Course (New York, NY Mar. 22, 2010).
- 696. “Real World Ethical Issues,” with Jeremy R. Feinberg, Hon. James C. Francis IV, Pery D. Krinsky, and Laura Smith, at the Association of the Bar of the City of New York (New York, NY Mar. 25, 2010).
- 697. “Special Masters for E-Discovery Management and Dispute Resolution,” with Hon. Richard A. Levie, Hon. Shira A. Scheindlin, and Kenneth J. Withers, The Sedona Conference Voices From the Desert Webinar Series (Apr. 14, 2010).
- 698. “Rule 45 Subpoenas and Non-Party Production Issues in Electronic Discovery: Assessing the Burdens and Costs and Avoiding the Pitfalls,” with Anne Marie Gibbs and Babette V.E. Orenstein, Lorman Education Services Teleconference (Apr. 20, 2010).
- 699. “Discovery 2.0,” with Richard G. Braman and John H. Jessen, at the Mid-Year Meeting of The Sedona Working Group on Electronic Document Retention & Production (WG1) (Denver, CO Apr. 21, 2010).

700. “Ethics Surrounding the Use of E-mail, Cell Phones and Other Electronics,” Continuing Legal Education (“CLE”) Program for Mental Hygiene Legal Services, Second Judicial Department, Appellate Division, State of New York (White Plains, NY Apr. 27, 2010).
701. “2010: An E-Discovery Odyssey,” with David R. Buchanan, William P. Butterfield, Adam I. Cohen, Hon. Shira A Scheindlin, and Emily Gold Waldman, co-sponsored by the Westchester Committee of the Federal Bar Council and PACE Law School (White Plains, NY Apr. 27, 2010).
702. “Searching for ESI in All the Wrong Places: What Every Lawyer Needs to Know About Using Search Tools in E-Discovery,” with Terry Sweeney, IE Discovery, Inc. Program for Government Attorneys (Washington, DC Apr. 28, 2010).
703. “Ethics Surrounding the Use of E-mail, Cell Phones and Other Electronics,” Continuing Legal Education (“CLE”) Program for Mental Hygiene Legal Services, Second Judicial Department, Appellate Division, State of New York (Central Islip, NY May 4, 2010).
704. “Electronic Data in Litigation: Trends in Discovery & Ethics (ESI Quarterly Spring 2010),” with Hon. Ronald J. Hedges and Jeane A. Thomas, American Law Institute / American Bar Association (“ALI-ABA”) Audio Webcast Program (May 13, 2010).
705. “Understanding and Managing the Risks and Costs of Electronic Discovery,” with Ralph M. Levene, Continuing Legal Education (“CLE”) Program at ConocoPhillips (Houston, TX May 18, 2010).
706. “Hot Topics in ESI Search and Retrieval,” with Jason R. Baron and Brett B. Bordon, at the American Bar Association (“ABA”) Section of Science & Technology Law’s E-Discovery and Digital Evidence (“EDDE”) Committee First Annual Electronic Discovery and Digital Evidence Practitioners’ Workshop (Chicago, IL May 19, 2010).
707. “Lunch Hour E-Discovery Briefing: What the Advisory Committee on Civil Rules Had to Say at the 2010 Conference on Civil Litigation,” with Hon. John M. Facciola, Hon. Paul W. Grimm, and Hon. Ronald J. Hedges, Bureau of National Affairs (“BNA”) Audioconference (May 25, 2010).
708. “Direction(s) From Duke: Are There E-Discovery Rules Changes Ahead?,” with William P. Butterfield, Mary Mack and Hon. David J. Waxse, Fios Webinar (June 2, 2010).
709. “Form of Production; Accessible / Not Reasonably Accessible Information; Cost Sharing / Shifting; Privilege and Federal Rule of Evidence 502,” Guest Lecturer with Patrick L. Oot at Hon. Ronald J. Hedges’ Georgetown University Law Center Introduction to Electronic Discovery and Evidence Course (Washington, DC June 6, 2010).
710. “Some Things You Should Know About E-Discovery,” Continuing Legal Education (“CLE”) Program at Wachtell, Lipton, Rosen & Katz (New York, NY June 16, 2010).
711. “Current Ethical Issues in Privacy & Information Security for Lawyers,” at Practising law Institute’s (“PLI’s”) Eleventh Annual Privacy and Security Law Institute (New York, NY June 22, 2010).
712. “Legal Ethics Issues in Cloud Computing,” with Jeremy R. Feinberg, at Practising Law Institute’s (“PLI’s”) Cloud Computing 2010: Is Your Company Ready? (San Francisco, CA June 23, 2010).

713. “What Keeps Me Up at Night and What Drives Me Crazy About E-Discovery,” with Hon. Gail A. Andler, Carmen Oveissi Field, Hon. Elizabeth D. Laporte, and Tami S. Smason, Panel Sponsored by Women in eDiscovery at LegalTech West Coast 2010 (Los Angeles, CA June 24, 2010).
714. “Reducing Litigation Costs,” with Patrick L. Oot, at LegalTech West Coast 2010 (Los Angeles, CA June 24, 2010)
715. “Deal with the Challenges of Litigation Holds: Pension Committee and Progeny,” with Annie Goranson, Robert D. Owen and Farrah Pepper, at The Executive Counsel Institute's E-Discovery for the Corporate Market: Controlling Your E-Discovery Destiny (New York, NY July 12, 2010).
716. “Select and Develop the Right Relationships and Tools,” with Lynn Mestel and Adam Rubinger, at The Executive Counsel Institute’s E-Discovery for the Corporate Market: Controlling Your E-Discovery Destiny (New York, NY July 13, 2010).
717. “Rights of Public and Private Sector Employees in the Electronic Age: Lessons from Quon and Stengart,” with Kevin F. Brady and Hon. Ronald J. Hedges, Bureau of National Affairs (“BNA”) Audioconference (July 14, 2010).
718. “The State of Search in 2010 – A Roundtable Discussion with the Bench, Bar, and Experts,” with Hon. Paul W. Grimm, Bruce Hedin, and Kenneth J. Withers, Webinar sponsored by H5 (July 19, 2010).
719. “E-Discovery for New York State Judges,” with Hon. James C. Francis IV, Video Broadcast in conjunction with the 2010 Judicial Summer Seminars of the New York State Judicial Institute (July 23, 2010)
720. “This Really Happened: A Review of Real World Ethical Issues 2010,” with Hon. Sheila Abdus-Salaam, Jeremy R. Feinberg, Pery D. Krinsky, and Daniel Weitz, at Practicing Law Institute (“PLI”) (New York, NY July 28, 2010).
721. “Managing Against Security Risks and Embracing the Marketing Opportunities: Systems, Protocols, Contracts, and Other Useful Tools,” with Woods K. Abbott, Andy Grover, Kevin R. Haley, and Joel Wuesthoff, Conference on Data Security and Management in Global Commerce sponsored by the Center for Law & Innovation of the University of Maine School of Law (Portland, ME Aug. 5, 2010).
722. “The Digital Revolution and e-Discovery – Transforming the Legal Profession,” with Hon. John M. Facciola, Lucy L. Thompson, Richard L. Marcus, and Stephanie Mendelsohn, Presidential CLE Centre Showcase Program sponsored by the Section of Science & Technology Law of the American Bar Association (“ABA”), at the ABA 2010 Annual Meeting (San Francisco, CA Aug. 7, 2010).
723. “Electronic Data in Litigation: Trends and Developments (ESI Quarterly Fall 2010),” with Hon. Ronald J. Hedges and Jeane A. Thomas, American Law Institute / American Bar Association (ALI-ABA) Audio Webcast Program (Sept. 14, 2010).
724. “Pre-Litigation Strategies: Creating an E-Discovery Preparedness Plan,” with Thomas Y. Allman and Joel M. Mitnick, at the Practicing Law Institute’s (“PLI’s”) Electronic Discovery Guidance 2010: What Corporate and Outside Counsel Need to Know (New York, NY Sept. 20, 2010).
725. “Understanding and Managing the Risks and Costs of Electronic Discovery,” with John F. Savarese, Continuing Legal Education (“CLE”) Program at UBS (Stamford, CT Sept. 23, 2010).

- 726. “Search Technologies: What These Are, What are the Costs, and What is “Reasonable?” with Hon. Paul W. Grimm and Kenneth J. Withers, at the Federal Judicial Center 2010 E-Discovery Seminar for Federal Judges (Washington, DC. Sept. 27, 2010).
- 727. “Form of Production,” with Hon. James C. Francis IV and Hon. Frank S. Maas, at the Federal Judicial Center 2010 E-Discovery Seminar for Federal Judges (Washington, DC Sept. 28, 2010).
- 728. “Rule 502, Privilege, and Work Product,” with Hon. Paul W. Grimm and Kenneth J. Withers, at the Federal Judicial Center 2010 E-Discovery Seminar for Federal Judges (Washington, DC Sept. 28, 2010).
- 729. “Practitioners’ Panel,” with William P. Butterfield, Adam C. Losey, and Hon. Barbara J. Rothstein, at the Federal Judicial Center 2010 E-Discovery Seminar for Federal Judges (Washington, DC Sept. 29, 2010).
- 730. “Discovery 2.0,” with Richard G. Braman, Derek G. Howard, John H. Jessen, and Jennifer Kneadle Mason, at the 2010 Annual Meeting of The Sedona Conference Working Group on Document Retention & Production (Paradise Valley, AZ Oct. 7, 2010).
- 731. “Rule 45 Subpoenas and Non-Party Production Issues in Electronic Discovery: Assessing the Burdens and Costs and Avoiding the Pitfalls,” with Anne Marie Gibbs and Babette V.E. Orenstein, Lorman Education Services Teleconference (Oct. 12, 2010).
- 732. “The Slippery Slope From Preservation to Sanctions: A Review of 2010’s Major E-Discovery Cases From Pension Committee Through Victor Stanley, with Kevin F. Brady, Hon. Paul W. Grimm, Hon. Ronald J. Hedges, and Jeane A. Thomas, Bureau of National Affairs (“BNA”) Audioconference (Oct. 13, 2010).
- 733. “An Introduction to Electronic Discovery for New Associates,” with Luis A. McNish, at Wachtell, Lipton, Rosen & Katz (New York, NY Oct. 14, 2010).
- 734. “A Short Course in E-Discovery for Judges,” with Craig Ball and Hon. Shira A. Scheindlin, at the Delaware Fall Judicial Conference (Wilmington, DE Oct. 15, 2010).
- 735. “Honey, I Shrunk the Records: The Perils of Preservation,” at the National Archives and Records Administration Southeast Region's 2010 E-Records Forum (Atlanta, GA Oct. 19, 2010).
- 736. “E-Discovery from the Bench,” Guest Lecturer with Hon. Shira A. Scheindlin, at William Causey's and Peter Gronvall's Georgetown University Law Center Electronic Discovery Seminar (Washington, DC Oct. 19, 2010).
- 737. “How to Successfully Manage Your E-Discovery Matter: Project Management 101,” with David K. Gaston, Patrick McColloch, and Leslie Wharton, at IE Discovery's Third Annual Electronic Discovery Symposium for Governmental Agencies (Washington, DC Oct. 20, 2010).
- 738. “Cost Containment: Preservation Techniques for Litigation,” with Jason R. Baron and Jennifer Mason, American Records Management Association (“ARMA”) International Webinar (Oct. 25, 2010).
- 739. “Understanding and Managing the Risks and Costs of Electronic Discovery,” with Ralph M. Levene, Continuing Legal Education (“CLE”) Program at UBS (Weehawken, NJ Oct. 26, 2010).

740. “Rule 45 Subpoenas and Non-Party Production Issues in Electronic Discovery: Assessing the Burdens and Costs and Avoiding the Pitfalls,” with Anne Marie Gibbs and Babette V.E. Orenstein, Lorman Education Services Teleconference (Oct. 28, 2010).
741. “An Introduction to Electronic Discovery,” Guest Lecturer with Adam I. Cohen at Emily Gold Waldman’s Pace Law School Civil Procedure 1 Course (New York, NY Nov. 1, 2010).
742. “Ethics and the Use of Technology,” Guest Lecturer at Jeremy R. Feinberg’s Columbia Law School Professional Responsibility Course (New York, NY Nov. 1, 2010).
743. “Achieving Proportionality in Search,” with Jason R. Baron, Hon. Paul W. Grimm, and Ralph C. Losey, at Capital One’s Second Annual Seminar on Moving Towards Proportionality in E-Discovery (McLean, VA Nov. 3, 2010).
744. “Achieving Proportionality in the Government/Regulatory Context,” with Hon. John M. Facciola, Andrew D. Goldsmith, Tracy Greer, and John Woods, at Capital One’s Second Annual Seminar on Moving Towards Proportionality in E-Discovery (McLean, VA Nov. 3, 2010).
745. “TREC Legal Track 2009 Results & 2010 Update,” with Jason R. Baron, at the Birds of a Feather Gathering re: Achieving Quality in E-Discovery Searches (San Francisco, CA Nov. 5, 2010).
746. “You Say, ‘Toe-May-Toe,’ and I Say, ‘Toe-Mah-Toe’: Differences in How Records Managers and Lawyers Use Search Technology to Accomplish Their Goals,” with Terry Sweeney, at the American Records Management Association (“ARMA”) International / International Legal Technology Association (“ILTA”) Legal Information Technology Conference 2010 (“Lit-Con 2010”) on Mitigating Risk and Maximizing Revenues with Information Governance (San Francisco, CA Nov. 6, 2010).
747. “Cost Containment: Preservation Techniques for Litigation,” with Jason R. Baron and Jennifer Mason, at the American Records Management Association International (ARMA International) 55th Annual Conference & Expo (San Francisco, CA Nov. 7, 2010).
748. “An Introduction to Electronic Discovery for New Associates,” with Luis A. McNish, at Wachtell, Lipton, Rosen & Katz (New York, NY Nov. 11, 2010).
749. “TREC 2010 Legal Track Overview,” with Bruce Hedin, at the National Institute of Standards and Technology’s (“NIST’s”) TREC 2010 Conference (Gaithersburg, MD Nov. 17, 2010).
750. “Ethics Game Show: Some Real World ‘E-thical’ Issues,” with Hon. John M. Facciola, Hon. James C. Francis IV, and Hon. Paul W. Grimm, at the Georgetown University Law Center’s Eighth Annual Advanced E-Discovery Institute (Crystal City, VA Nov. 19, 2010).
751. “Cloud & Web Computing: How Courts are Responding to New Technologies in Litigation,” with Hon. Ronald J. Hedges and Jon A. Neiditz, at American Law Institute / American Bar Association (“ALI-ABA”) Video Webcast (Philadelphia, PA Dec. 2, 2010).
752. “Frontiers of E-Discovery: What You Need to Know About Predictive Coding,” with Jason R. Baron and Bennett B. Borden, Virtual LegalTech Webinar (Dec. 6, 2010).
753. “Some Things You Should Know About Search,” at the Connecticut Chapter of Women in eDiscovery (Hartford, CT Dec. 7, 2010).

754. "A Judicial Training Program on Concept Search," with Karl A. Schieneman, Live Program and Webinar (New York, NY Dec. 9, 2010).
755. "Judicial Perspective on Concept Searching and Predictive Coding," with Chris Dale, Hon. John M Facciola, Hon. Paul W. Grimm, and Karl Schieneman, JurInnov Ltd. ESIBytes Podcast (Dec. 20, 2010).

2009 TALKS

756. "Complex Cases and Structured Data Discovery from an Attorney's Point of View," with Alexander Arata, Todd J. Marlin, and Babette V.E. Orenstein, at LegalTech New York 2009 (New York, NY Feb. 2, 2009).
757. "Buyer Beware: How TREC Can Help You Evaluate Your E-Discovery Investments," with Jason R. Baron, Dan Brassil, Douglas W. Oard, and Venkat Rangan, H5 and Clearwell Systems E-Discovery Webinar (Mar. 19, 2009).
758. "Current Issues in Privilege, Ethics, and Compliance," with David Gruenstein, CLE at Ziff Brothers Investments (New York, NY Mar. 23, 2009).
759. "Achieving Quality in the E-Discovery Process," with Jason R. Baron, Macyl A. Burke, Kenneth J. Withers, and Joe Looby, The Sedona Conference Voices From the Desert Webinar Series (Mar. 20, 2009).
760. "Ethical Aspects of Privacy and Information Security for Lawyers," at Practising Law Institute's ("PLI's") Tenth Annual Institute on Privacy & Security Law (New York, NY June 23, 2009).
761. "A Primer on Electronic Discovery for Ziff Brothers Investments, LLC," CLE at Ziff Brothers Investments, LLC (New York, NY June 25, 2009).
762. "Ethics: Professional Obligations in eDiscovery, Part I," with Hon. Ronald J. Hedges and Jeane A. Thomas, American Law Institute /American Bar Association ("ALI-ABA") Audio Webcast Program (June 30, 2009).
763. "An Introduction to Electronic Discovery for New York State Court Attorneys," with Jeremy R. Feinberg, Program sponsored by the State Court Counsel Committee for the State Bar (New York, NY July 15, 2009).
764. "Multiple Representation, Privilege, and Ethical Issues in Legal Practice Today," with Evan J. Farber and David Gruenstein, CLE at Ziff Brothers Investments, LLC (New York, NY July 16, 2009).
765. "This Really Happened: A Review of Real World Ethical Issues 2009," with Hon. Sheila Abdus-Salaam, Jeremy R. Feinberg, Pery D. Krinsky, and Paul D. Sarkozi, at Practising Law Institute ("PLI") (New York, NY July 29, 2009).
766. "Search Tools and Filtering Technologies," with Jason R. Baron and Herbert L. Roitblat, at the Georgetown University Law Center E-Discovery Training Academy (Washington, DC Aug. 4, 2009).
767. "Ethics and E-Discovery Roundtable," with Hon. Ronald J. Hedges and Browning E. Marean III, at the 2009 International Legal Technology Association Conference: Leading Technology / Optimizing Value ("ILTA '09") (National Harbor, MD Aug. 26, 2009).

768. “An Introduction to Electronic Discovery for New Associates,” with Luis A. McNish, at Wachtell, Lipton Rosen & Katz (New York, NY Sept. 17, 2009).
769. “Technology Solutions to Information Management Problems: Increasing Efficiency and Reducing Costs Through the Use of Emerging Data Management Applications and Advanced Search Tools,” with Jason R. Baron and Ronni D. Solomon, at the American Conference Institute’s 7th Annual Advanced Forum on Document Management & E-Discovery (Philadelphia, PA Sept. 22, 2009).
770. “Document Review,” with Richard G. Braman and Joseph P. Guglielmo, at The Sedona Conference Working Group on Electronic Document Retention & Production 2009 Annual Meeting (Atlanta, GA Oct. 2, 2009).
771. “Pre-Litigation Strategies: Putting Technology in Your Corner,” with Ashish S. Prasad, at Practicing Law Institute’s (“PLI’s”) Electronic Discovery Guidance 2009: What Corporate and Outside Counsel Need to Know (New York, N.Y. Oct. 6, 2009).
772. “The View From the Other Side of the Table: How to Get What You Want From the Meet-and-Confer (or its Equivalent) Without Shooting Yourself in the Foot,” with Andrew D. Goldsmith, at IE Discovery’s Second Annual Electronic Discovery Symposium for Governmental Agencies (Washington, DC Oct. 6, 2009)
773. “Sedona Conference Update: Achieving Quality in the E-Discovery Process,” with Thomas Y. Allman, and Jason R. Baron, and Mary Mack, Fios Inc. Webcast (Oct. 7, 2009).
774. “International Disclosure and Privacy: Minimize Risk and Maximize Compliance,” with E. Regan Adams, Alexandra E. Chopin, Conor R. Crowley, and Thomas F. Matzen, at the Masters Conference for Legal Professionals – Global Corporate Change: Navigating Discovery, Risk, and Security (Washington, DC Oct. 13, 2009).
775. “A Real-World View of E-Discovery from Outside Counsel’s Perspective,” Guest Lecturer at Joel Wuesthoff’s University of Maine Law School e-Discovery and Forensics Course (Portland, ME Oct. 19, 2009).
776. “This Really Happened: A Review of Real World Ethical Issues 2009,” with Jeremy R. Feinberg, Paul I. Marx, Edward Mevec, and Deborah A. Scalise, at the Westchester County Bar Association (Yonkers, NY Oct. 20, 2009).
777. “This Really Happened: A Review of Real World Ethical Issues 2009 for New York State Court Attorneys,” with Jeremy R. Feinberg, Michael Klein, Melissa Nickson, and David Tennant, at the 2009/2010 Legal Update Program sponsored by the New York State Judicial Institute (Rochester, NY Oct. 28, 2009).
778. “Ethics in the Electronic Age for New York State Court Attorneys,” with Jeremy R. Feinberg, at the 2009/2010 Legal Update Program sponsored by the New York State Judicial Institute (Rochester, NY Oct. 28, 2009).
779. “What Does it Take to Achieve a Quality E-Discovery Process?: Using Sampling, Metrics and Other Methods,” with Jason R. Baron, Alexandra E. Chopin, and David Lasater, at Capital One Financial Corporation’s First Annual Seminar on E-Discovery: The Future of Search (McLean, VA Nov. 10, 2009).

780. “Advanced Search and Retrieval Technology,” with Jason R. Baron, Ralph C. Losey, and Ellen Voorhees, at The Georgetown University Law Center Advanced E-Discovery Institute 2009 (Washington, DC Nov. 13, 2009).
781. “Ethics: Professional Obligations in eDiscovery, Part II,” with Hon. Ronald J. Hedges and Jeane A. Thomas, American Law Institute / American Bar Association (AL-ABA) Audio Webcast Program (Nov. 16, 2009).
782. “An Introduction to Electronic Discovery for New Associates,” with Luis A. McNish, at Wachtell, Lipton, Rosen & Katz (New York, NY Nov. 18, 2009).
783. “What Would You Do? The Ethics Game Show,” with Jeremy R. Feinberg, Hon. Ira S. Warshawsky, Peter A. Zablotsky, and Hon. Hope S. Zimmerman, at the Nassau County Bar Association (Mineola, NY Nov. 19, 2009).
784. “An Update on Legal and Ethical Issues Involving Metadata, Social Networking, and Electronic Discovery,” CLE at Ziff Brothers Investments, LLC, (New York, NY Nov. 30, 2009).
785. “This Really Happened: A Review of Real World Ethical Issues 2009 for New York State Court Attorneys,” with Maryita Dobiel, Jeremy R. Feinberg, and Joanne Haelen, at the 2009/2010 Legal Update Program sponsored by the New York State Judicial Institute (Saratoga, NY Dec. 1, 2009).
786. “Ethics in the Electronic Age for New York State Court Attorneys,” with Jeremy R. Feinberg, at the 2009/2010 Legal Update Program sponsored by the New York State Judicial Institute, (Saratoga, NY Dec. 1, 2009).
787. “Criminalization of Spoliation: Answers to the Questions That Keep You Up at Night,” with Patrick J. Burke, Andrew D. Goldsmith, Hon. Andrew J. Peck, and Steven P. Solow, at the International Quality and Productivity Center (IQPC) 8th Annual eDiscovery Conference (New York, NY Dec. 8, 2009).
788. “Cross Border E-Discovery: Managing the Risks and Challenges,” with E. Regan Adams and Alysia A. Solow, at the New York City Chapter of Women in eDiscovery, (New York, NY Dec. 17, 2009).
789. “The Case for Cooperation in E-Discovery,” with William P. Butterfield, Hon. Andrew J. Peck, and Karl A. Schieneman, JurInnov Ltd. Podcast (Dec. 21, 2009).

2008 TALKS

790. “Commentary on Achieving Quality Control Over the E-Discovery Process: A Primer on Project Management, Methods & Metrics Version 3.0,” with Jason R. Baron, Macyl A. Burke, and Thomas P. Wisnowski, at the 2008 Mid-Year Meeting of The Sedona Conference Working Group on Electronic Document Retention & Production (New Orleans, LA May 15, 2008).
791. “Practicing What We Preach: Current Issues in Information Management, Legal Practice & Legal Ethics,” at Practising law Institute’s (“PLI’s”) Ninth Annual Institute on Privacy & Security Law (New York, NY June 24, 2008).
792. “An Introduction to Electronic Discovery for New York State Judicial Officers,” with John Vagelatos, at the 2008 Judicial Summer Seminars of the New York State Judicial Institute (Rye Brook, NY June 26, 2008).

793. “An Introduction to Electronic Discovery for New York State Judicial Officers,” with Jeremy R. Feinberg, at the 2008 Judicial Summer Seminars of the New York State Judicial Institute (Rye Brook, NY July 10, 2008).
794. “An Introduction to Electronic Discovery for New York State Judicial Officers,” with Jeremy R. Feinberg, at the 2008 Judicial Summer Seminars of the New York State Judicial Institute (Rye Brook, NY Aug. 28, 2008).
795. “Native Review and Production,” at the Kroll Ontrack 2008 E-Discovery Certification Course (Eden Prairie, MN Sept. 12, 2008).
796. “An Introduction to E-Discovery for New Associates,” with Luis A. McNish, at Wachtell, Lipton, Rosen & Katz (New York, NY Sept. 23, 2008,).
797. “An Introduction to E-Discovery for New Associates,” with Luis A. McNish, at Wachtell, Lipton, Rosen & Katz (New York, NY Oct. 14, 2008).
798. “Significant Ethical Issues Facing Inside Counsel: What In-House Counsel & Those Who Advise Them Need to Know,” with Paul Dutka, Jeremy R. Feinberg, and James W. Paul, at The Association of the Bar of the City of New York (New York, NY Oct. 15, 2008).
799. “Managing eDiscovery Risk While Driving Productivity and Reducing Costs” with Michael Patrick Sugrue, Andreae M. Selleck, and Emily Stapf, at the Masters Conference for Legal Professionals (Washington, DC Oct. 16, 2008).
800. “Discovery Disputes: Addressing the Complex Obligations of e-Discovery,” with Gary A. Adler, David M. Greenwald, and Ashish S. Prasad, at Practicing law Institute’s (“PLI’s”) Electronic Discovery and Retention Guidance for Corporate Counsel 2008 Program (New York, NY Nov. 5, 2008).
801. “A Primer on Electronic Discovery for the Suffolk County Bar Association / Suffolk Academy of Law,” with Jeremy R. Feinberg (Hauppauge, NY Nov. 6, 2008).
802. “Draft Toolkit for Volunteer Mediators / How to Roll Out a Court-Annexed eDiscovery ADR Program,” with Matthew I. Cohen and Sonya L. Sigler, at the 2008 Annual Meeting of The Sedona Conference Working Group on Electronic Document Retention & Production (Rancho Mirage, CA Nov. 14, 2008).
803. “A Brief Discussion of the 2008 TREC Legal Track,” with Jason R. Baron, at H5 Cocktails and Dinner in connection with the Georgetown University Law Center Advanced E-Discovery Institute (Washington, DC Nov. 19, 2008).
804. “Colloquium on the Future of Commercial Litigation in New York: Developing a Cost-Efficient Judicial Process for the Electronic Age,” Moderator of the morning session with Thomas Y. Allman, James M. Bergin, Hon. John L. Carroll, Hon. Elizabeth Hazlitt Emerson, and Kenneth J. Withers, sponsored by the New York State Judicial Institute at The Association of the Bar of the City of New York (New York, NY, Dec. 1, 2008).
805. “Finding a Better Way to Search: Benchmarking E-Discovery Methods,” with Jason R. Baron, Robert S. Bauer, Julia Brickell, and Hon. Paul W. Grimm, H5 Webinar (Dec. 10, 2008).

806. “A Primer on Electronic Discovery for the Departmental Disciplinary and Policy Committees of the New York Supreme Court, Appellate Division, First and Second Judicial Departments,” with Jeremy R. Feinberg (New York, NY, Dec. 11, 2008).